



Indigenous Peoples and Their Use of Media and Technology From Region to Region

December 14, 2023

Introduction

In order to provide a comprehensive understanding of how all Canadians use media and technology, the MTM continues to oversample Indigenous Peoples (First Nations, Métis and Inuit). We've also taken additional measures, such as allowing respondents to complete the survey in Cree and Inuktitut, as well as seeking out additional respondents through an online panel.

The results can be found in this latest report, providing a fulsome, in-depth and representative look at media and technology adoption and usage among Indigenous Peoples.

The Media Technology Monitor (MTM) incorporates a mixed-methodology approach which includes a phone survey and a follow-up survey online. The data from this report comes primarily from the Combined 2022-2023 survey unless otherwise noted.



Executive Summary



Subscriptions

Subscription services vary by region for Indigenous Peoples

61% of Indigenous Peoples have a paid TV subscription, but this number skews higher among the Indigenous population in Atlantic Canada (79%), Quebec (71%) and the North (75%) and dips lower among those in British Columbia (53%).

This is in contrast to home Internet subscriptions which reach 98% of the Indigenous population but remain lower in the North (84%).

Subscription services show little variation whether Indigenous Peoples live in or outside of their traditional Indigenous communities.



Devices

Smartphone adoption is nearly ubiquitous among Indigenous Peoples, but adoption of other technologies varies

69% of Indigenous Peoples own a tablet and game console ownership is at 58%. Those living in British Columbia break this trend in a notable way, however, with 76% owning a console.

84% of Indigenous Peoples have a connected TV set, with smart TVs with a built-in connection being the primary way to connect to the Internet.

Executive Summary



Hours

Time spent with media shifts from Indigenous Peoples in one region to another

Linear TV still makes up the single largest portion of viewing and peaks in the North at close to five hours above average. Radio also reaches its peak here.

Indigenous Peoples report listening to approximately 3 hours less of audio content each week compared to others living in Canada - 15.2 hrs/wk versus 18.1 hrs/wk respectively. Radio (terrestrial and online) makes up for the majority of this difference.

Time spent with online video now makes up over half of all TV/video viewing. This is largely driven by use of SVOD services.

Indigenous Peoples report spending nearly 30 hours each week online and approximately 13 hours weekly using social media sites.



Executive Summary



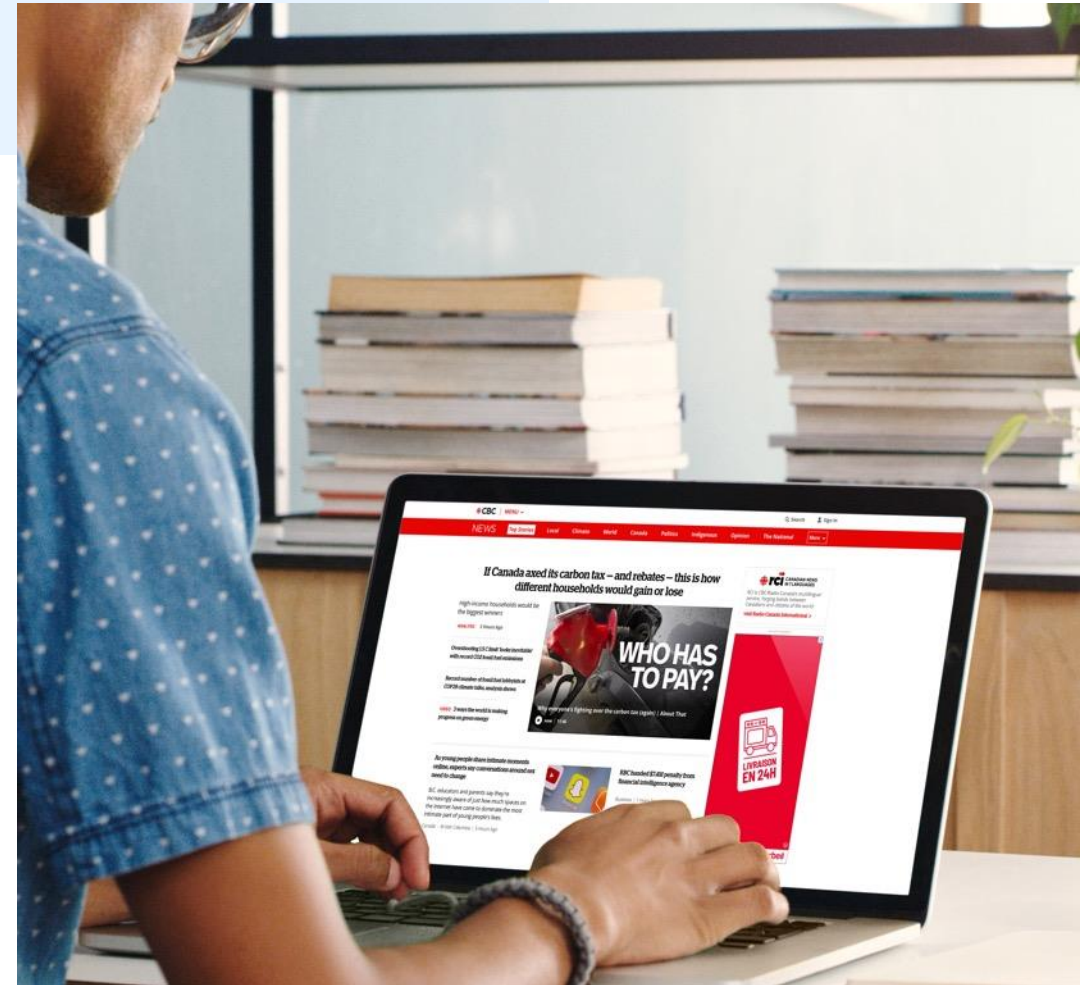
CBC and Radio-Canada

Indigenous Peoples are big fans of CBC and Radio-Canada

47% of English-speaking Indigenous Peoples have watched CBC TV and 25% have visited CBC.ca.

Usage of virtually all of CBC's services, including our TV and radio stations, as well as our website and the CBC news app, are more popular among English-speaking Indigenous Peoples in the North.

ICI Radio-Canada services are also resonating with French-speaking Indigenous Peoples. One of the biggest instances is ICI Radio-Canada Télé, used by 68% of the population.



Indigenous Peoples make up close to 5% of the Canadian population

According to the 2021 Census, over 1.8 million people identify as First Nations, Inuit or Métis. This is an increase of 8% over the 2016 Census period*.

The MTM continues to oversample among Indigenous Peoples across Canada and in the North. Additionally, the survey has now been made available to answer in Cree and Inuktitut and we have begun recruiting additional respondents via an online panel. This all contributes to a more fulsome and accurate understanding of Indigenous Peoples' media and technology usage and adoption.

Through these efforts and sampling in the North, we've surveyed 1,379 respondents who self-identify as Indigenous.





Indigenous Peoples tend to skew younger than the general population*

They are also more likely to have children living in the home*

Median Age

General Population

41 years

Indigenous Peoples

29 years

Kids (0-17yrs) in the Home

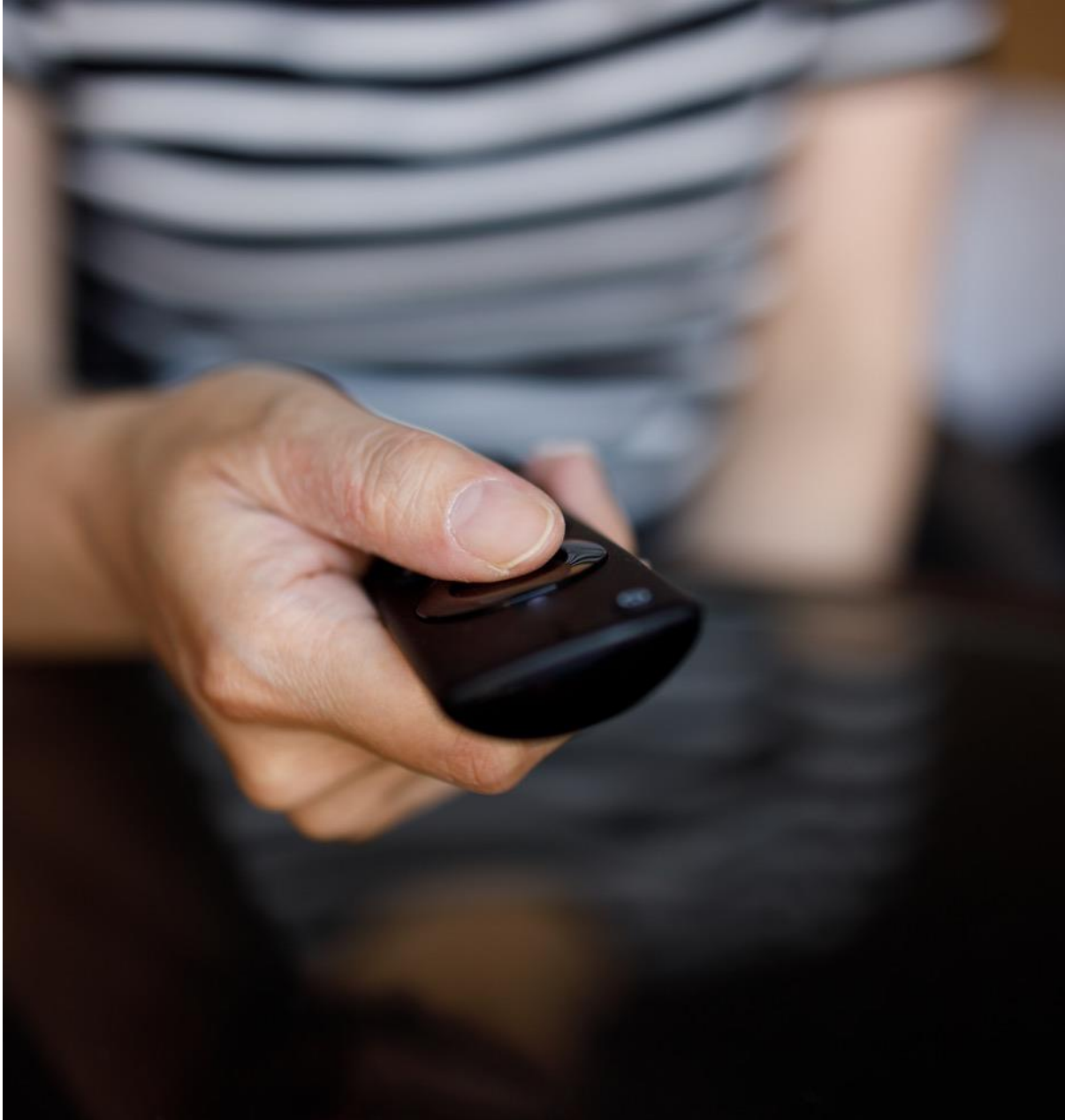
General Population

20%

Indigenous Peoples

32%

Demographics differences such as these can contribute to differences in media usage



Subscription Services

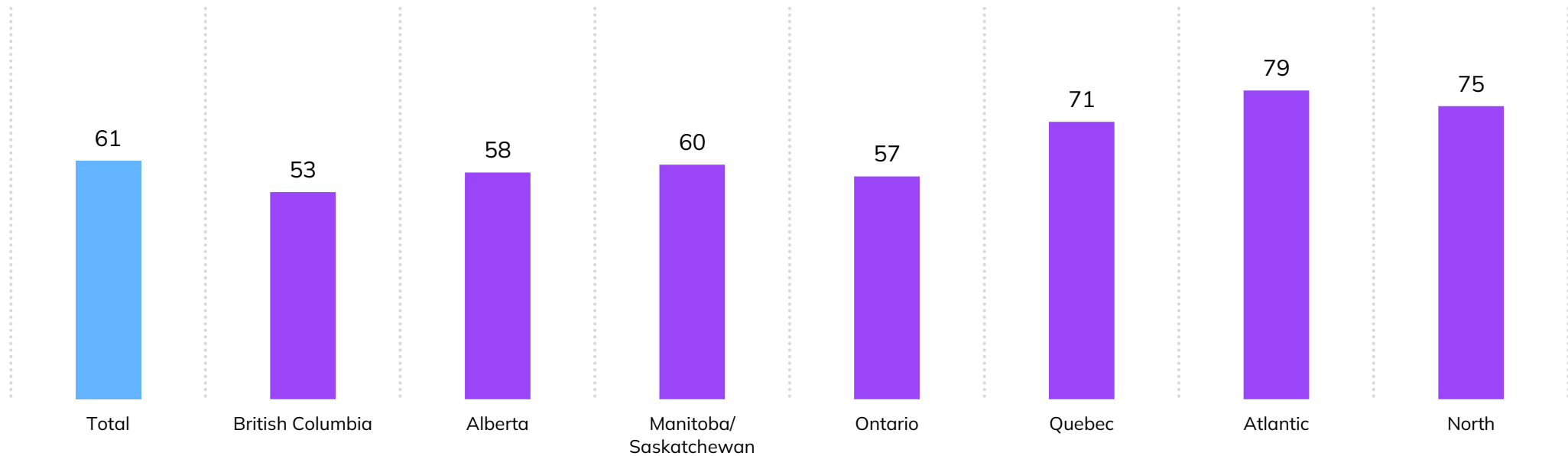


Indigenous Peoples who live further east and in the North are more likely to have a paid TV subscription and are more in line with the general population of Canada (70%)

Usage skews average or lower in other parts of Canada, especially in British Columbia.

Paid TV Service Subscribers*

Indigenous Population 18+ | %



*Paid TV service such as cable, satellite or fibre optic

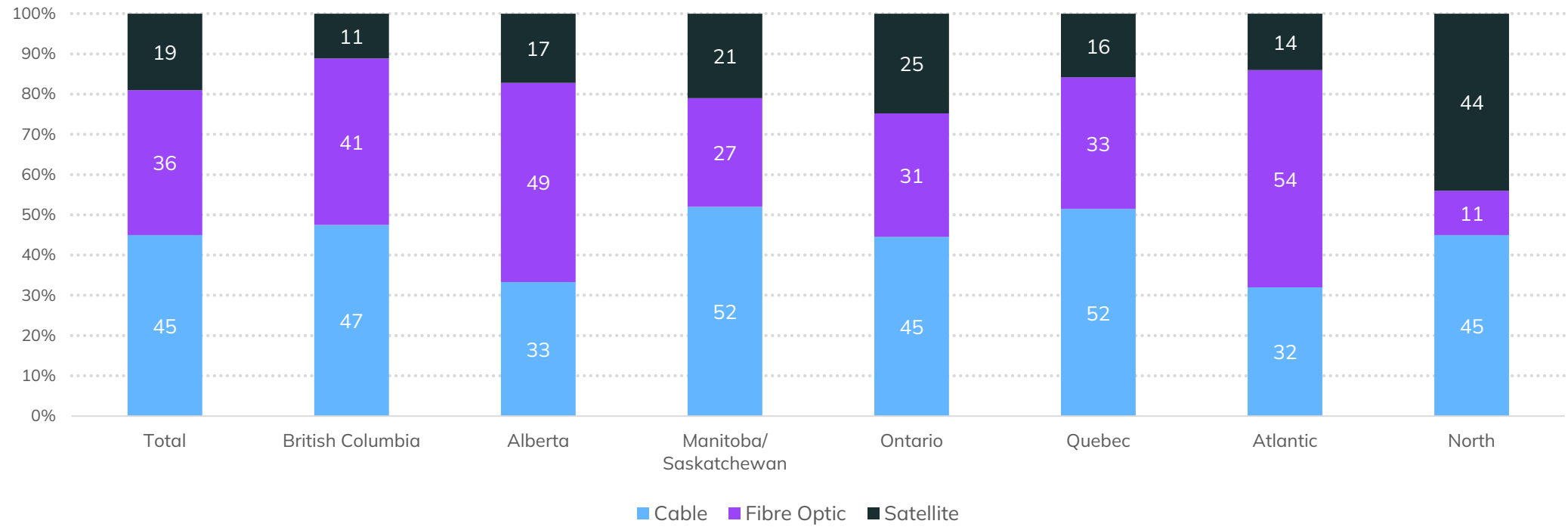


TV service types vary among Indigenous Peoples in different regions

Fibre optic services are far more common in Atlantic regions and Alberta, while cable services see a large footprint in Quebec and Manitoba and Saskatchewan. Satellite TV services are far more popular among Indigenous Peoples in the North compared to elsewhere in Canada.

Type of Paid TV Service

Indigenous Paid TV Service Subscribers 18+ | %





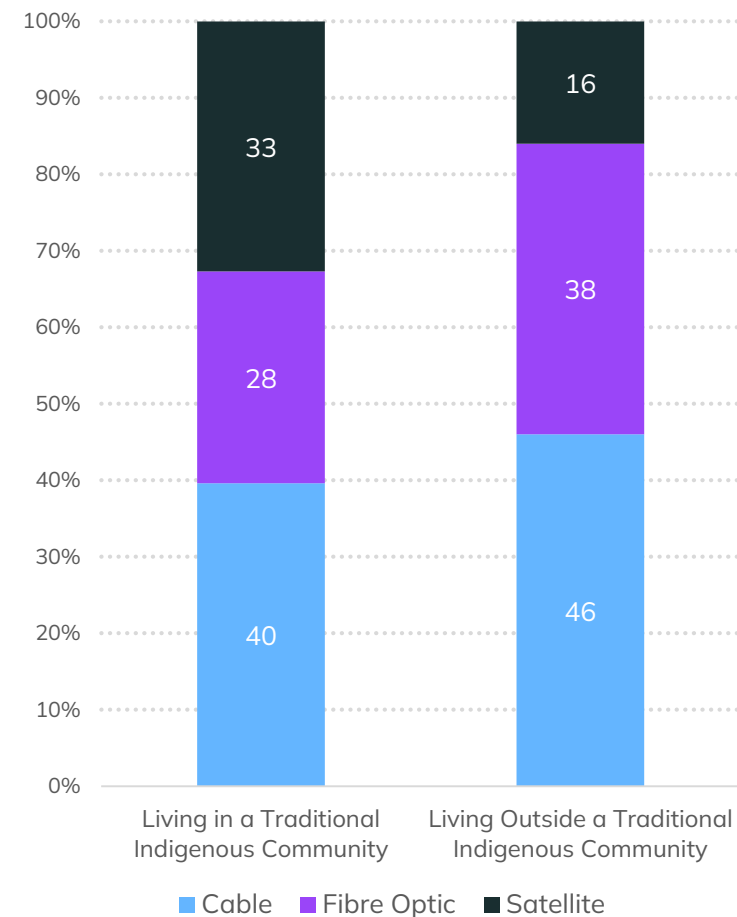
Whether respondents live in a traditional Indigenous community or not also impacts the type of TV service they subscribe to

Those living in traditional Indigenous communities are nearly twice as likely to be subscribing to satellite TV as those living outside of these communities. This is also a reflection of the remoteness of many of these communities where satellite TV may be the only option available.



Type of Paid TV Service

Indigenous Paid TV Service Subscribers 18+ | %





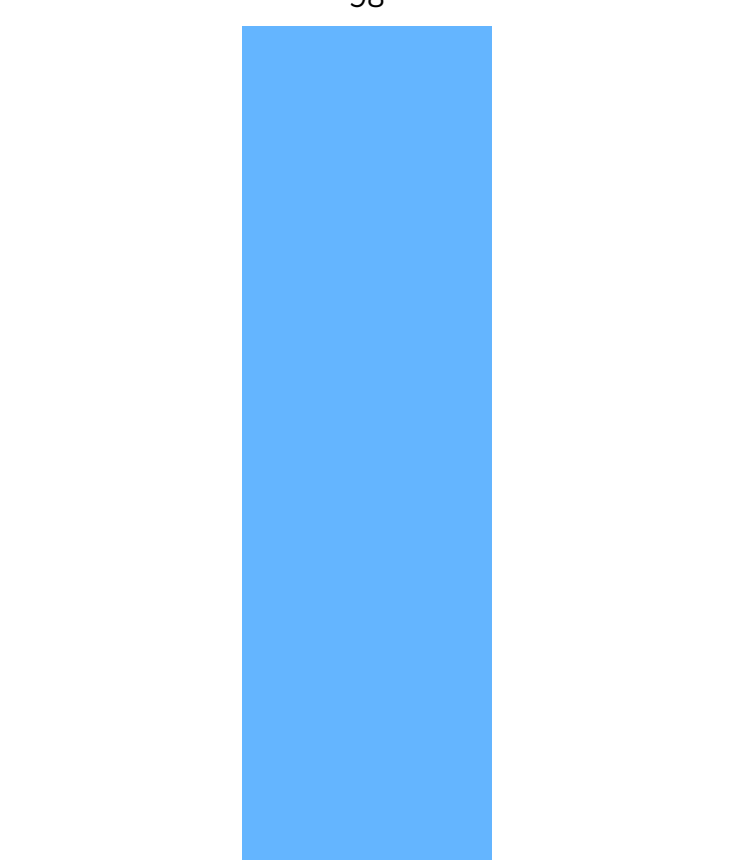
Home Internet is nearly ubiquitous among Indigenous households

This differs in the North, however, where the quality and speed of Internet service is often limited, and costs are significant. Only 84% of households in the North report having a home Internet connection.

Home Internet Subscribers

Indigenous Population 18+ | %

98



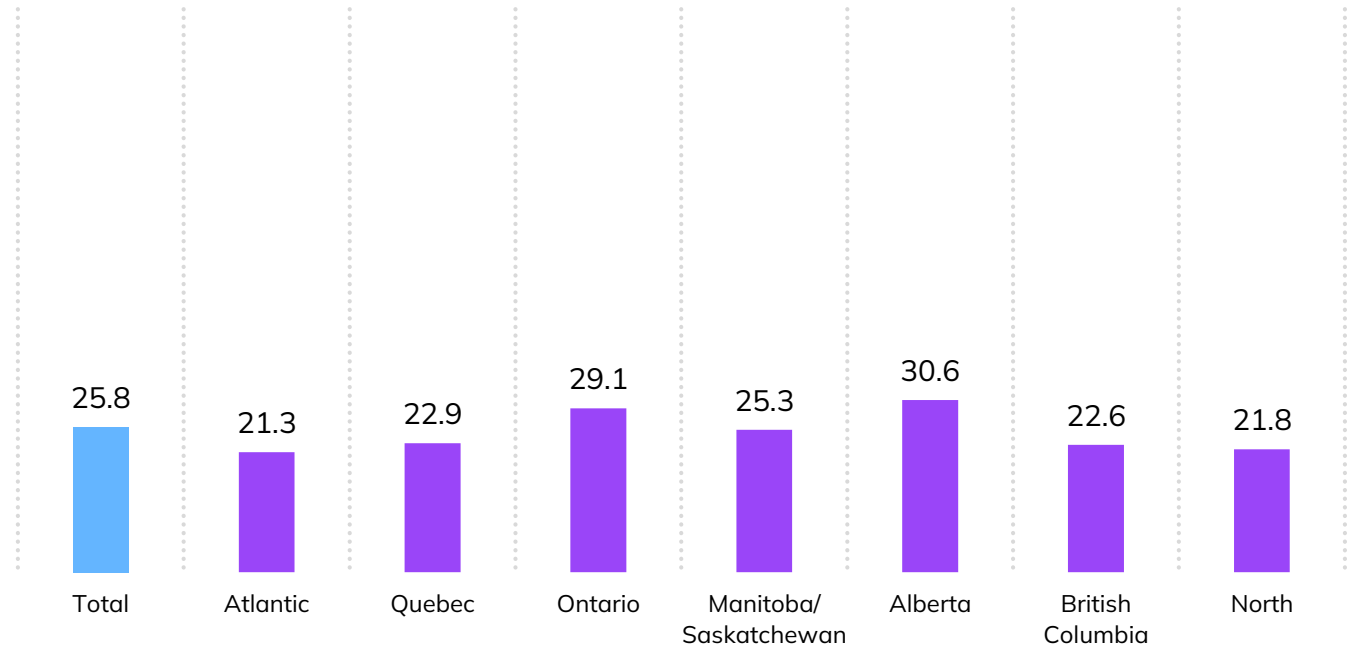


On average, Indigenous Peoples reports spending about 26 hours each week using the Internet

Those living in Alberta and Ontario are the most active online while those from Atlantic Canada and the North are among the least.

Self-Reported Hours of Internet Usage*

Indigenous Population 18+ | Hours in a Typical Week



*Self-reported hours are not meant to be a replacement for Numeris data.

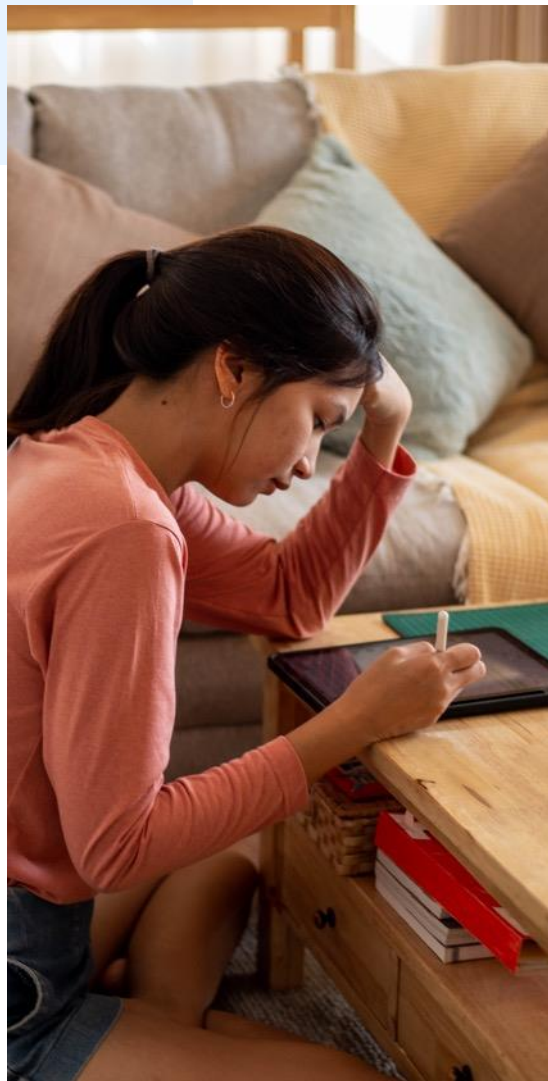


Device Ownership



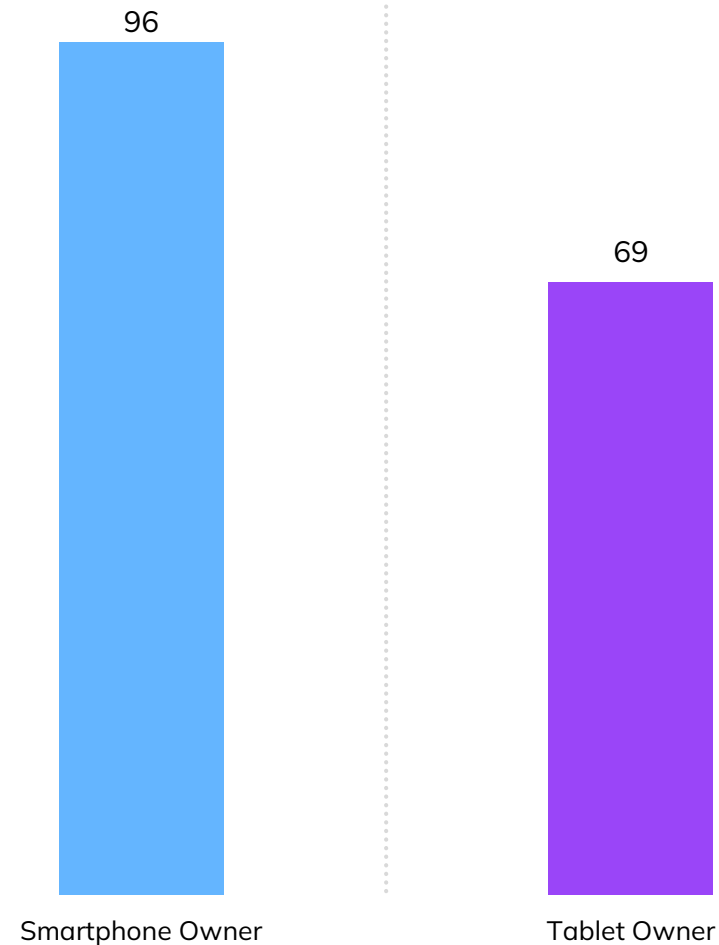
Smartphone ownership is nearly ubiquitous among Indigenous Peoples while 7 in 10 own a tablet

Those living in the North are less likely to own these devices with 86% owning a smartphone and 62% owning a tablet. These types of Internet connected devices may be less convenient considering the lower penetration of Internet in the home.



Device Ownership

Indigenous Population 18+ | %





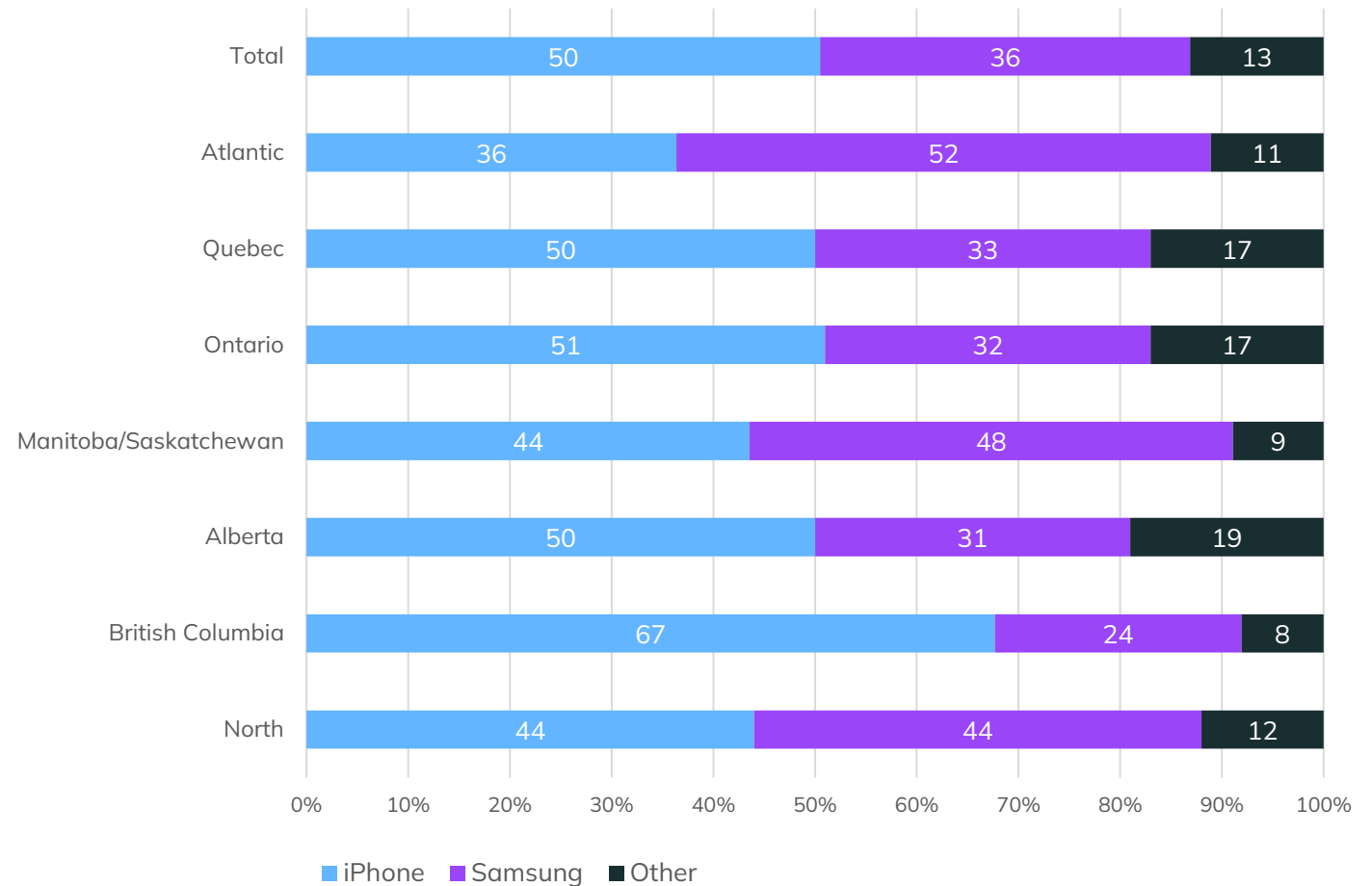
The iPhone is the preferred brand of smartphone for Indigenous Peoples, though popularity can vary by region

Two thirds of Indigenous smartphone owners in British Columbia have opted in for an iPhone, much higher than what we see in other regions (67% versus an average of 50%).

Samsung brand smartphones also have a large market share in some regions however, even surpassing Apple's iPhone in Atlantic Canada (52% versus 36%).

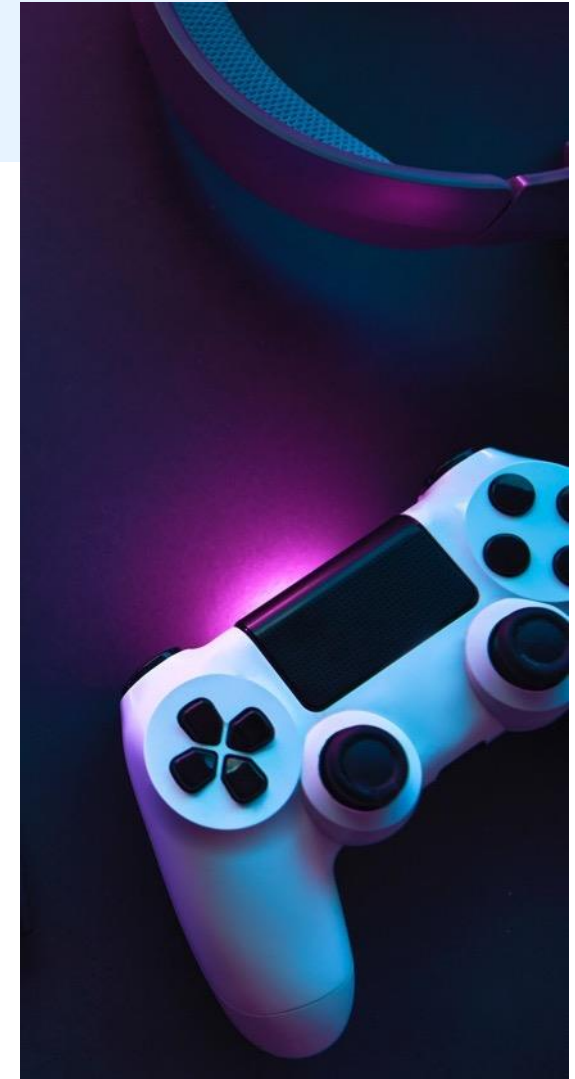
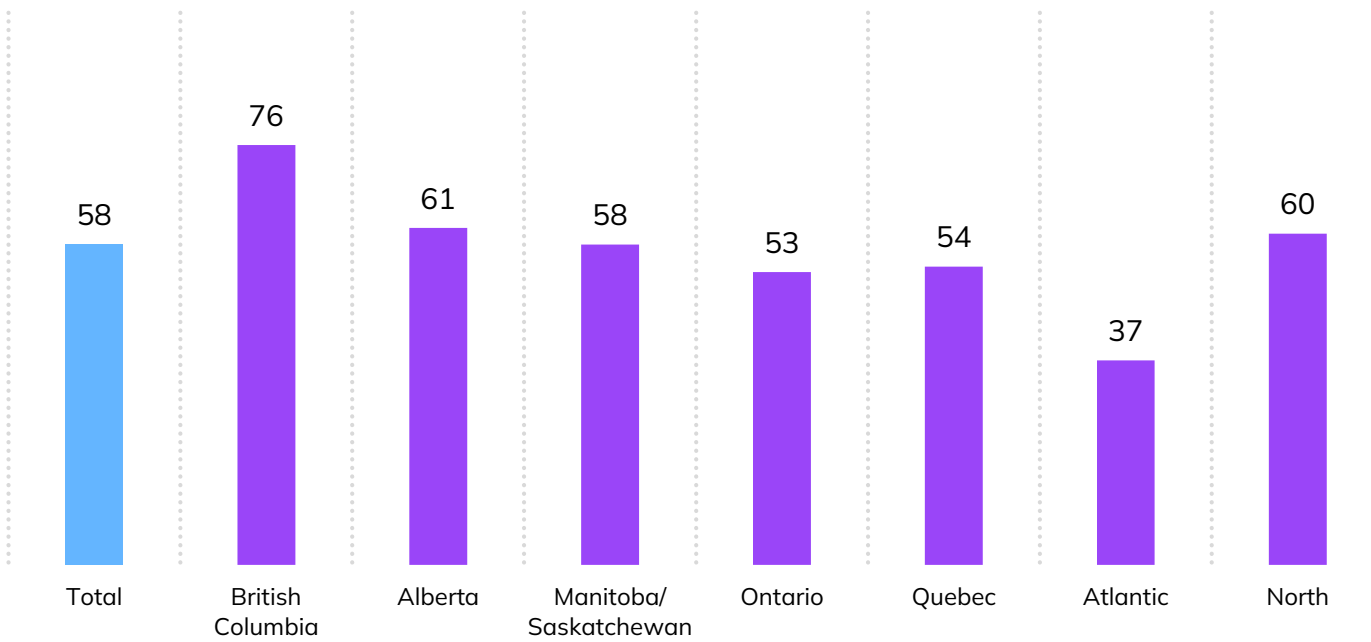
Smartphone Ownership by Brand

Indigenous Population with Smartphones 18+ | %



Indigenous Peoples from British Columbia are ahead of others in terms of game console ownership

Game Console Ownership
Indigenous Population 18+ | %





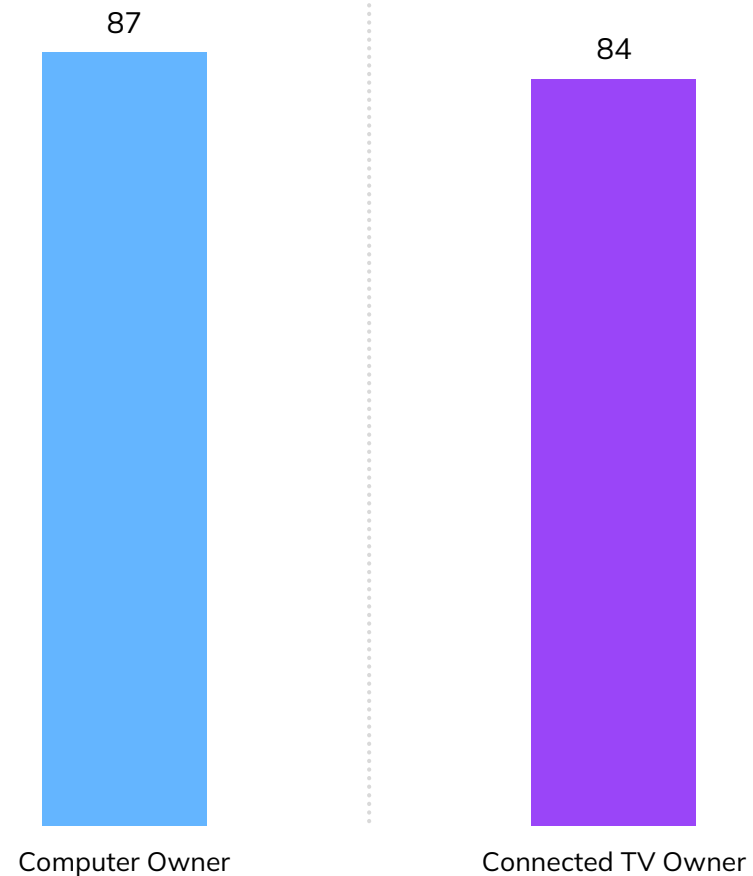
Computers and Connected TVs are also very common in Indigenous households

Again, this is less so among those living in the North - 71% own a computer and only 41% report owning a connected TV. Internet access is very likely a factor here as well.



Device Ownership

Indigenous Population 18+ | %

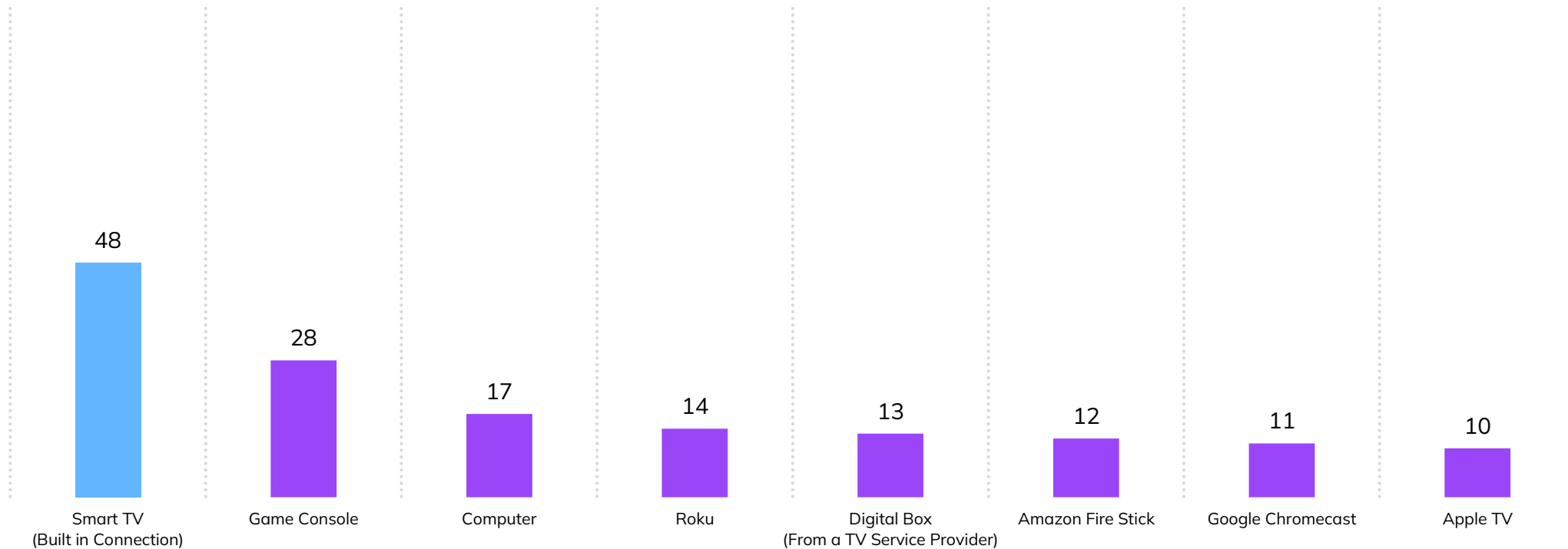




Close to half of all Indigenous Peoples have a Smart TV as their means to access the Internet on their TV set. A quarter use a game console.

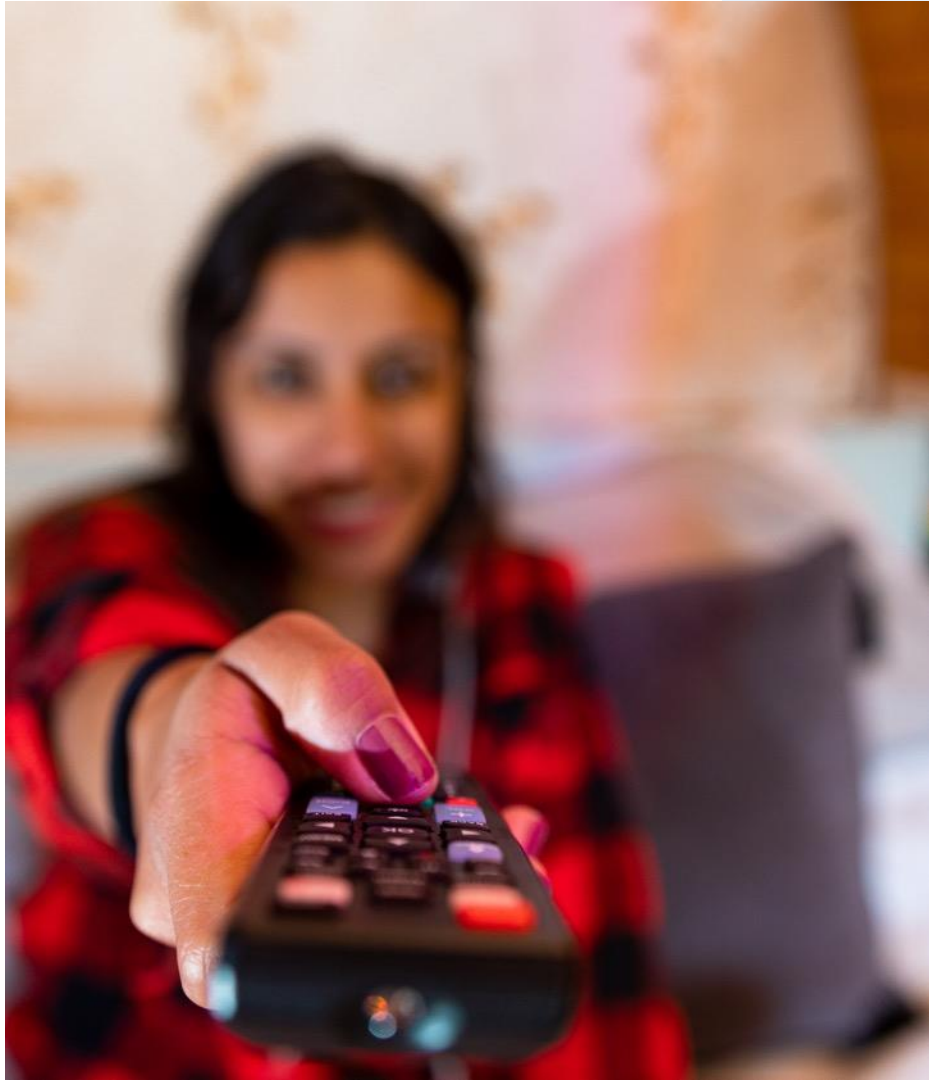
Device(s) Used to Connect TV Set to the Internet

Indigenous Population with a Connected TV Set 18+ | %





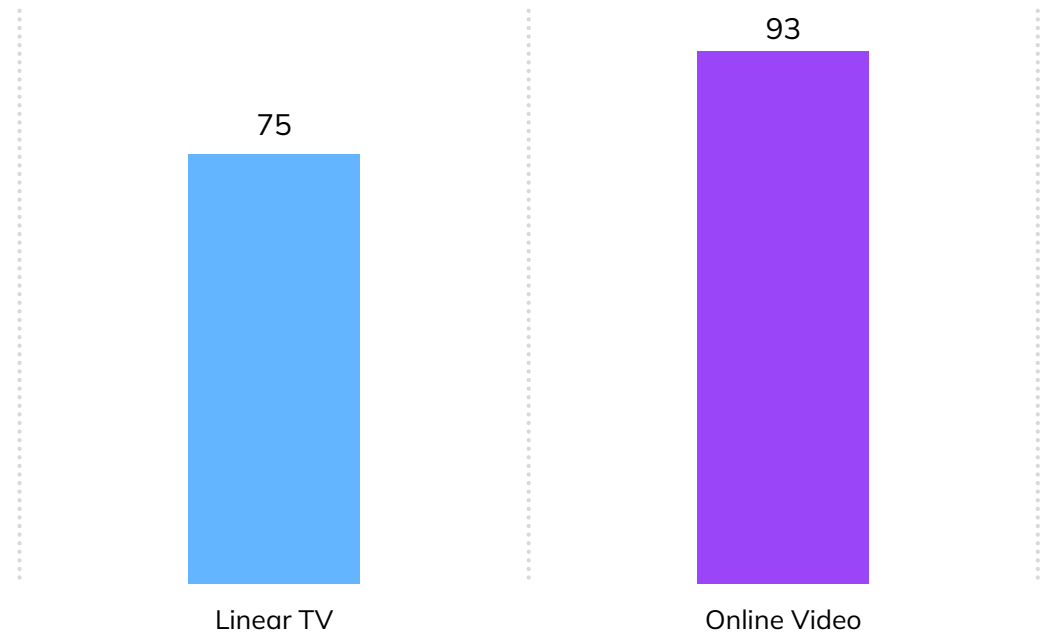
TV and Video Consumption



TV and online video viewing are common weekly activities

TV and Video Content Viewing in a Typical Week

Indigenous Population 18+ | %



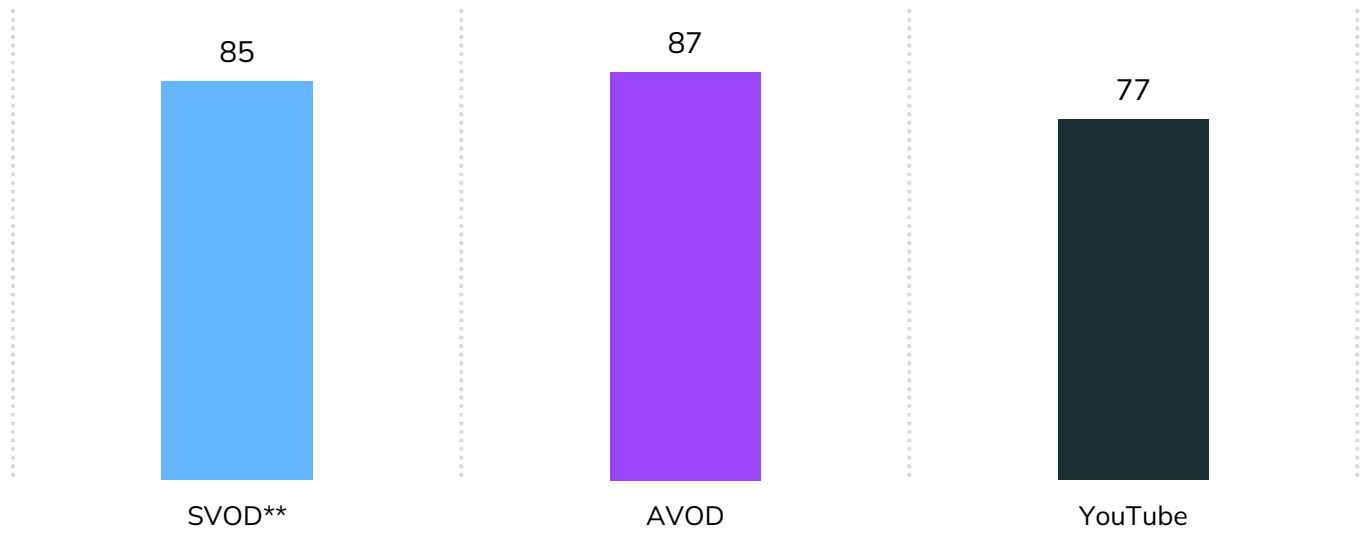


Viewership of SVOD and AVOD content remains at similar levels across most regions, with YouTube falling slightly behind both

People in the North break this trend as they are less likely to consume online video overall (60% SVOD; 77% AVOD; 57% YouTube) – likely linked to the quality of Internet service available in the home.

Online Video Content Viewing*

Indigenous Population 18+ | %



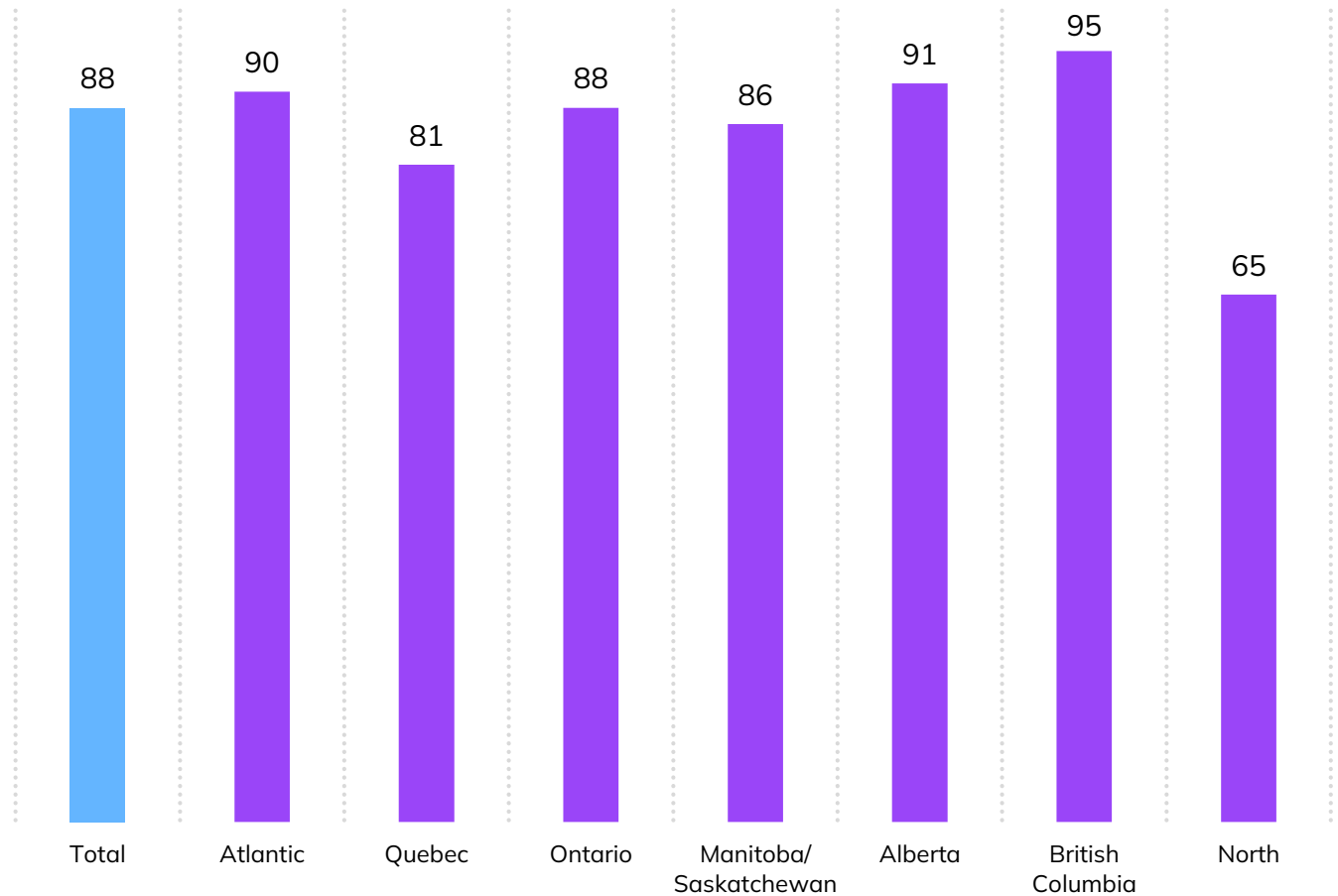
*Past month viewing.

**SVOD: Subscription Video on Demand (e.g. Netflix, Amazon Prime Video); AVOD: Ad Supported Video on Demand.



Indigenous Peoples in British Columbia are most likely to have a Subscription Video on Demand (SVOD) service for their home

Subscribes to an SVOD Service
Indigenous Population 18+ | %



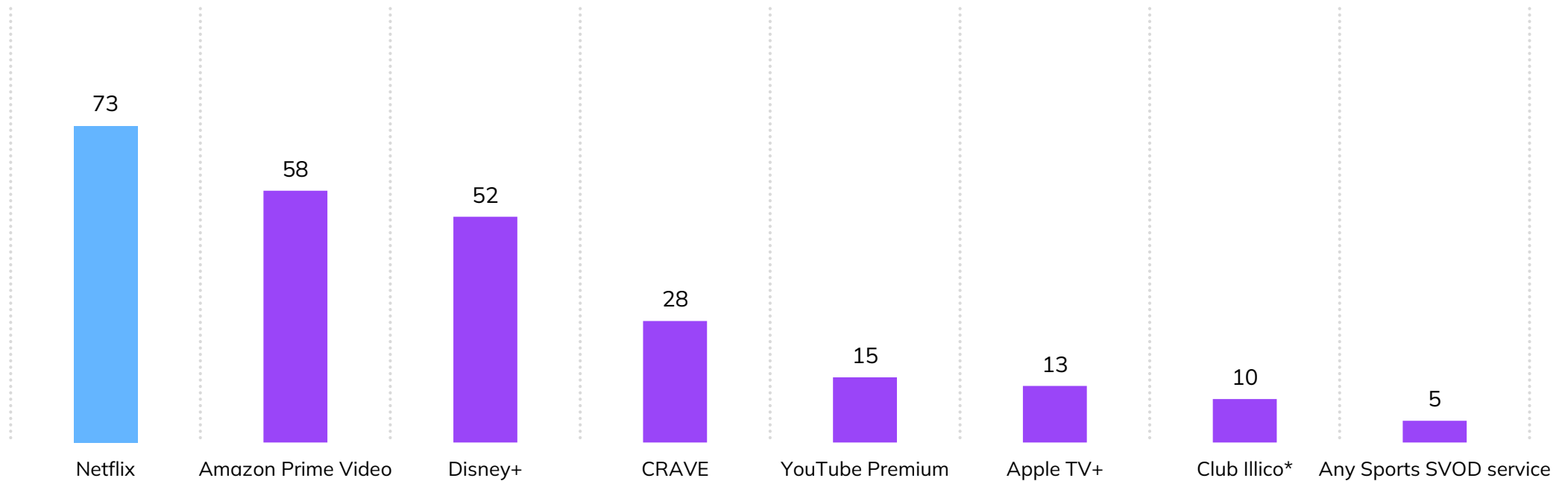


In terms of SVOD services, Netflix is the most popular with the Indigenous population

Not only are Indigenous Peoples more likely to have an SVOD subscription in the home than others living in Canada, they are 33% more likely to have a Disney+ subscription (52% versus 35%).

SVOD Subscriptions

Indigenous Population 18+ | %



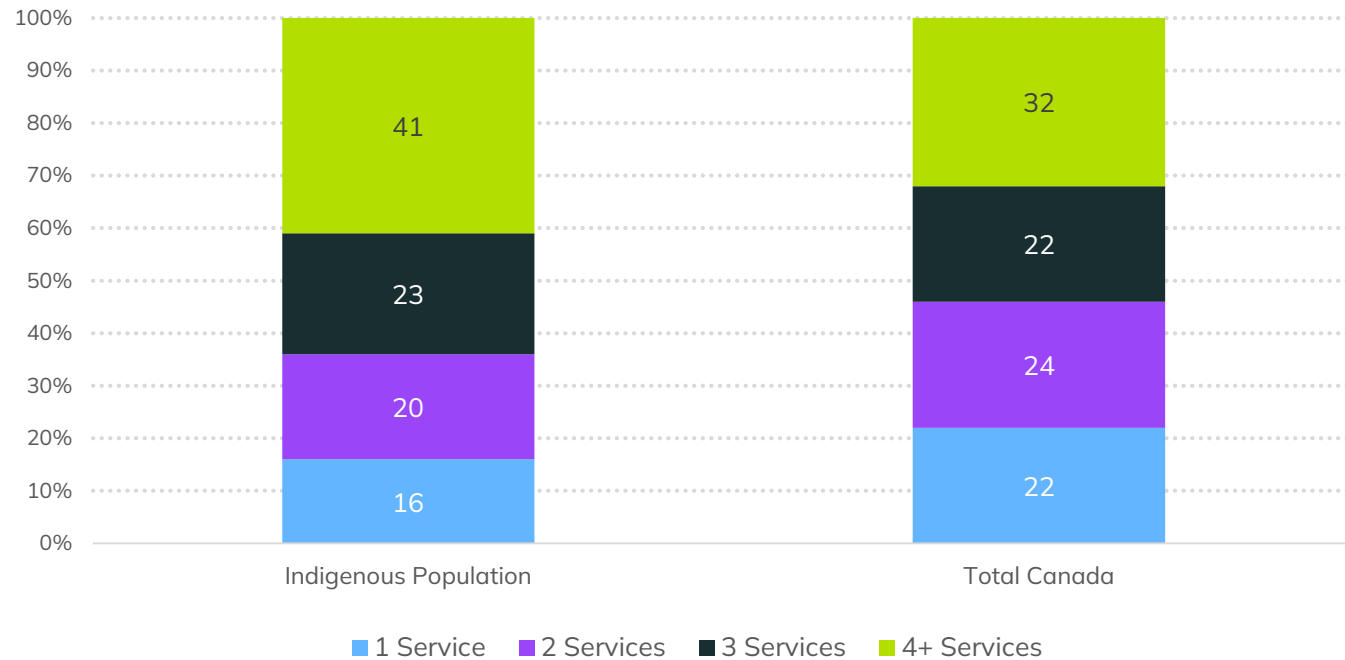
*Francophone data only for Club Illico.

Few Indigenous households are opting for just one SVOD service

Indigenous Peoples are 28% more likely than others living in Canada to subscribe to 4 or more services (41% versus 32%).

Average Number of SVOD Services

Respondents with an SVOD Subscription 18+ | %

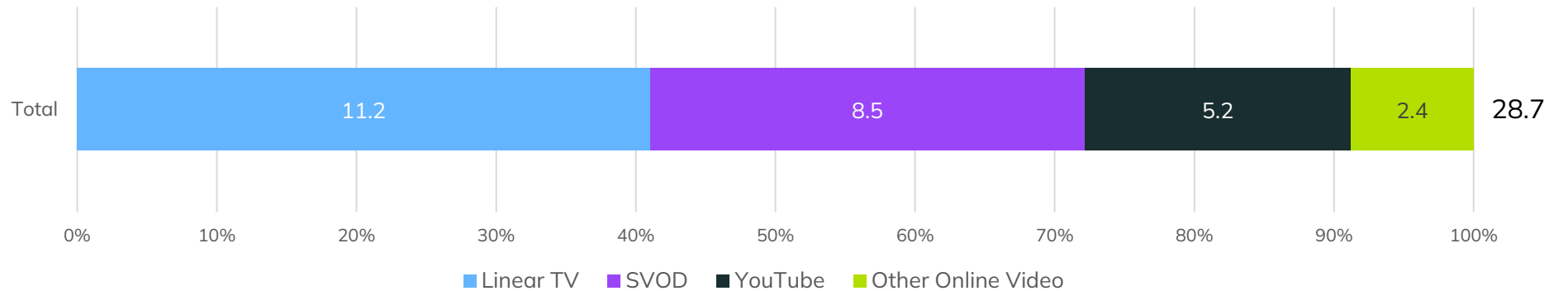




While linear TV viewing still makes up the single largest portion of viewing, online video now accounts for well over half of the time spent watching

Those living in the North report spending close to 5 hours more watching linear TV than the average Indigenous person.

Self-Reported Hours of Content Viewing*
Indigenous Population 18+ | Hours in a Typical Week



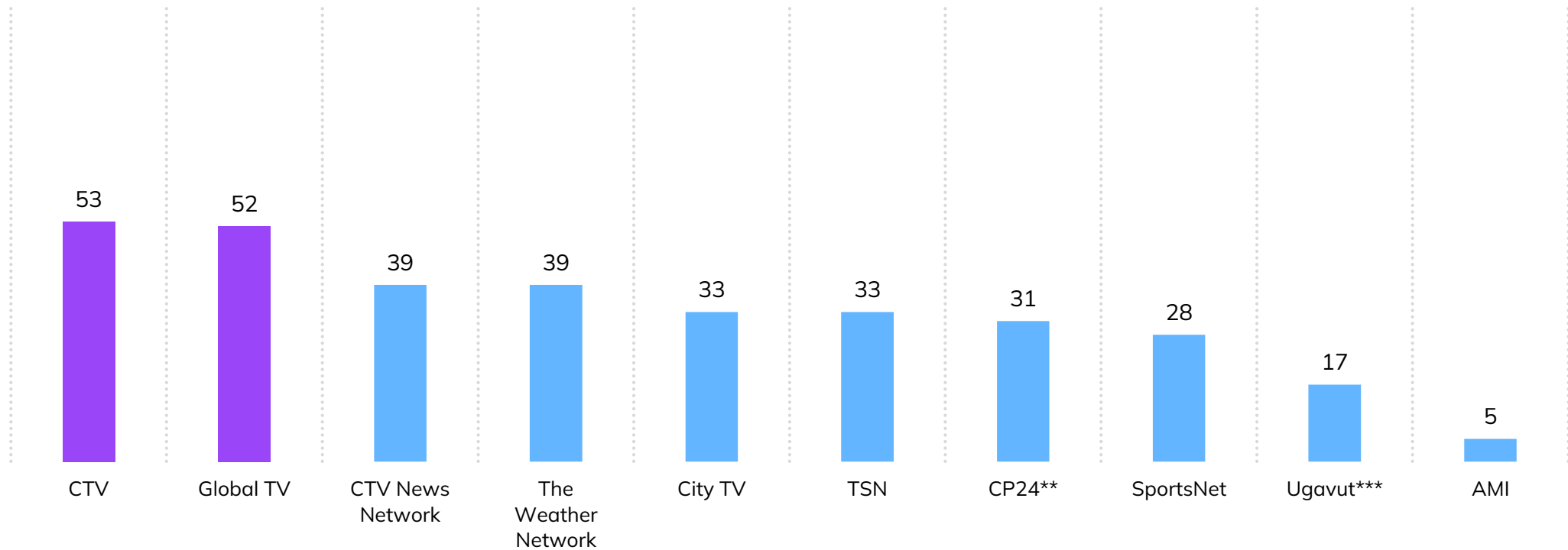
*Self-reported hours are not meant to be a replacement for Numeris data.



CTV and Global TV are both watched by about half of the English-speaking Indigenous population

TV Channels Watched*

English-Speaking Indigenous Population 18+ | %



*Any platform, past month.

**Among respondents residing in Ontario.

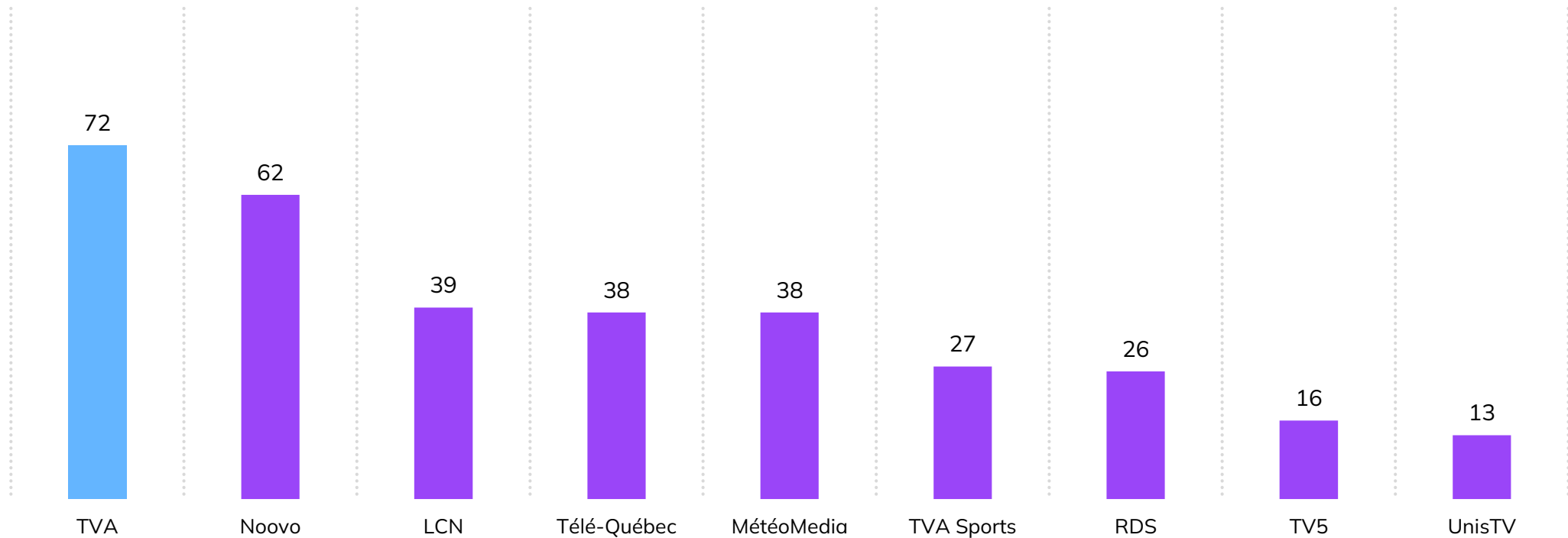
***Among respondents residing in the North



TVA is one of the most popular channels among the French-speaking Indigenous population, followed by Noovo

TV Channels Watched*

French-Speaking Indigenous Population 18+ | %



*Any platform, past month.



Audio and Radio Content

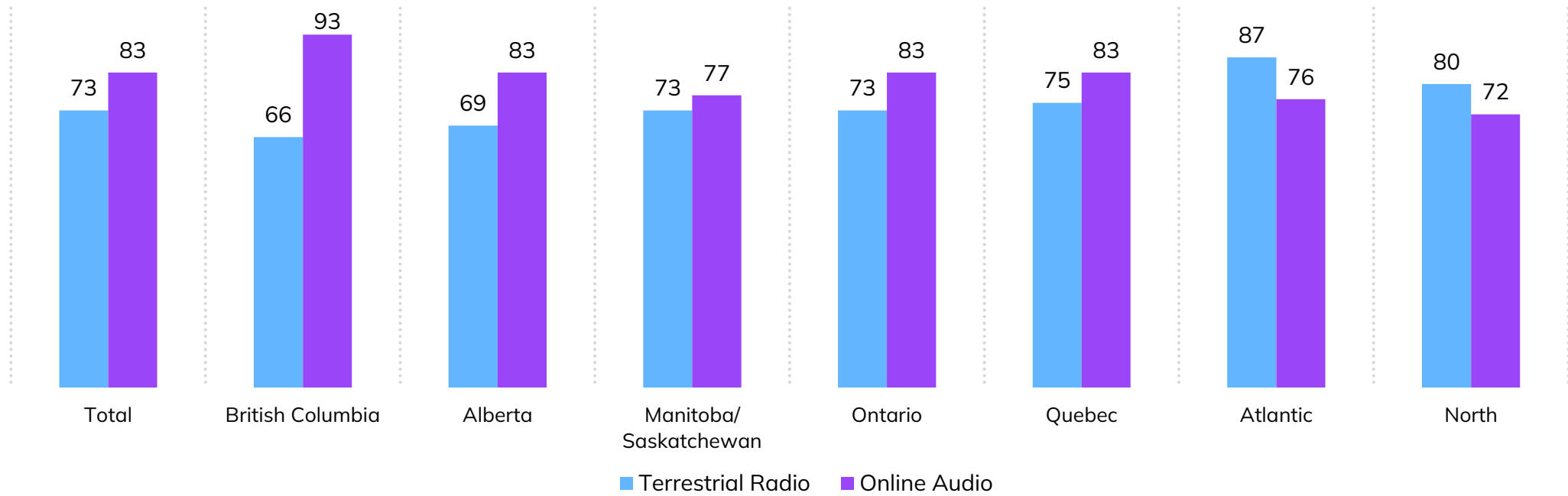


Online audio and terrestrial radio are both key content sources for Indigenous Peoples

Interest in terrestrial radio is highest among the Indigenous Population in Atlantic and Northern Canada. Online audio is nearly ubiquitous in British Columbia with 93% listening each week.

Listening to Audio in a Typical Week

Indigenous Population 18+ | %



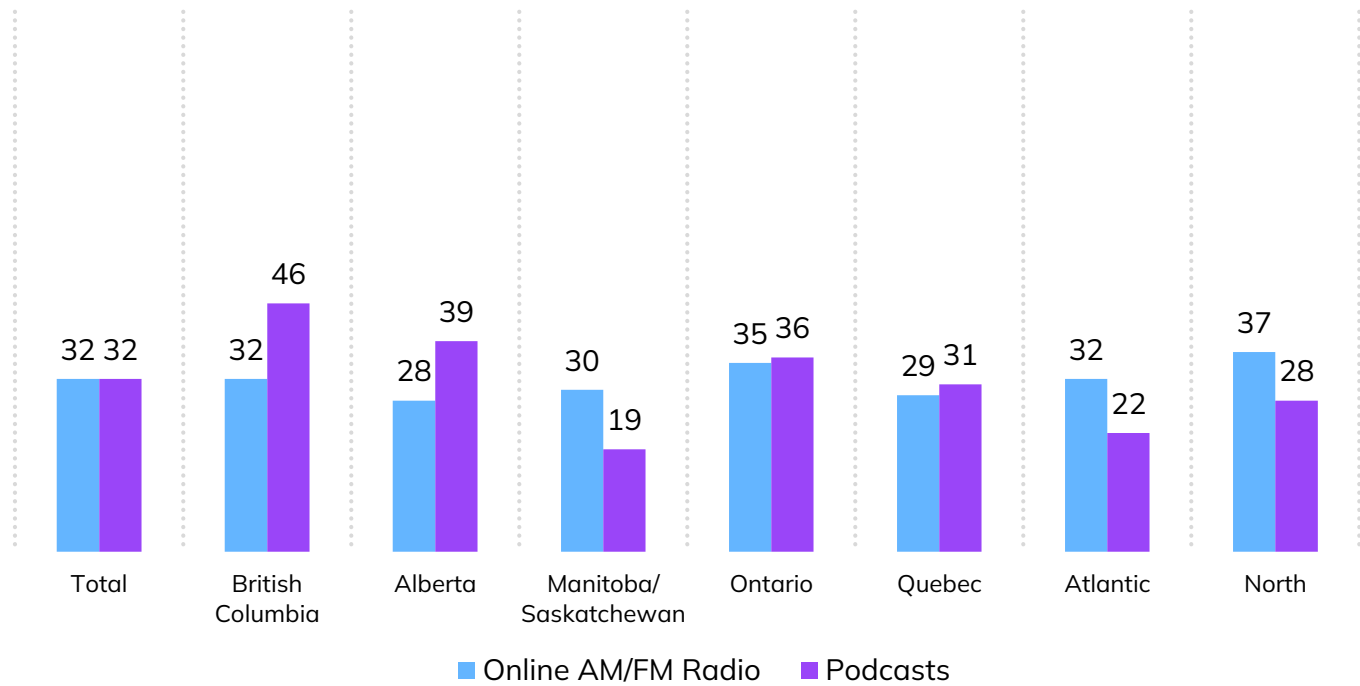


Online AM/FM doesn't vary much by region, but podcasting is another story

Usage of podcasts dips lower among Indigenous Peoples in Atlantic Canada and Manitoba/Saskatchewan, but usage in Alberta and British Columbia is well above average.

Listening to Audio*

Indigenous Population 18+ | %

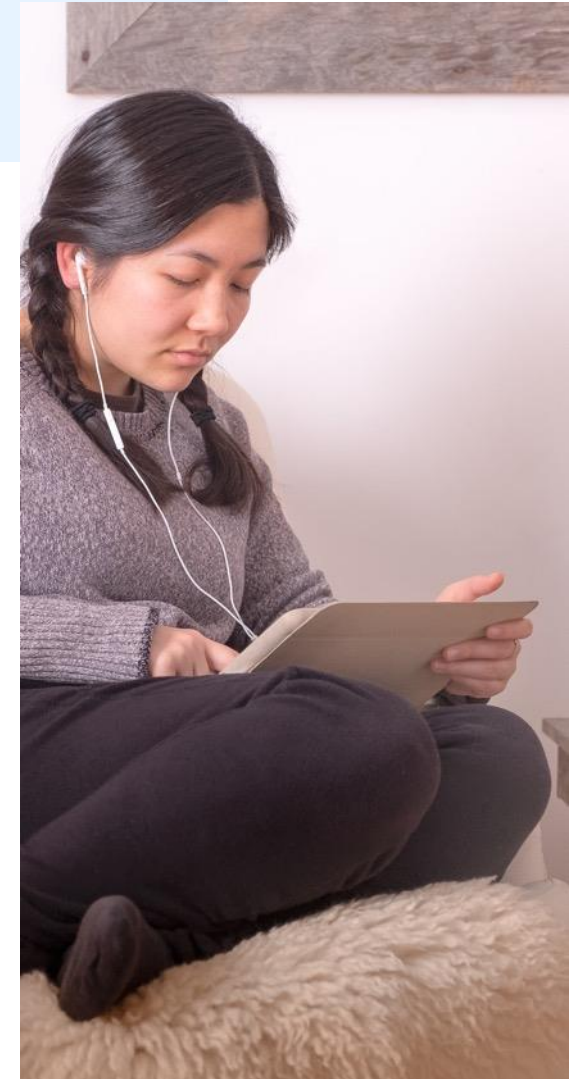
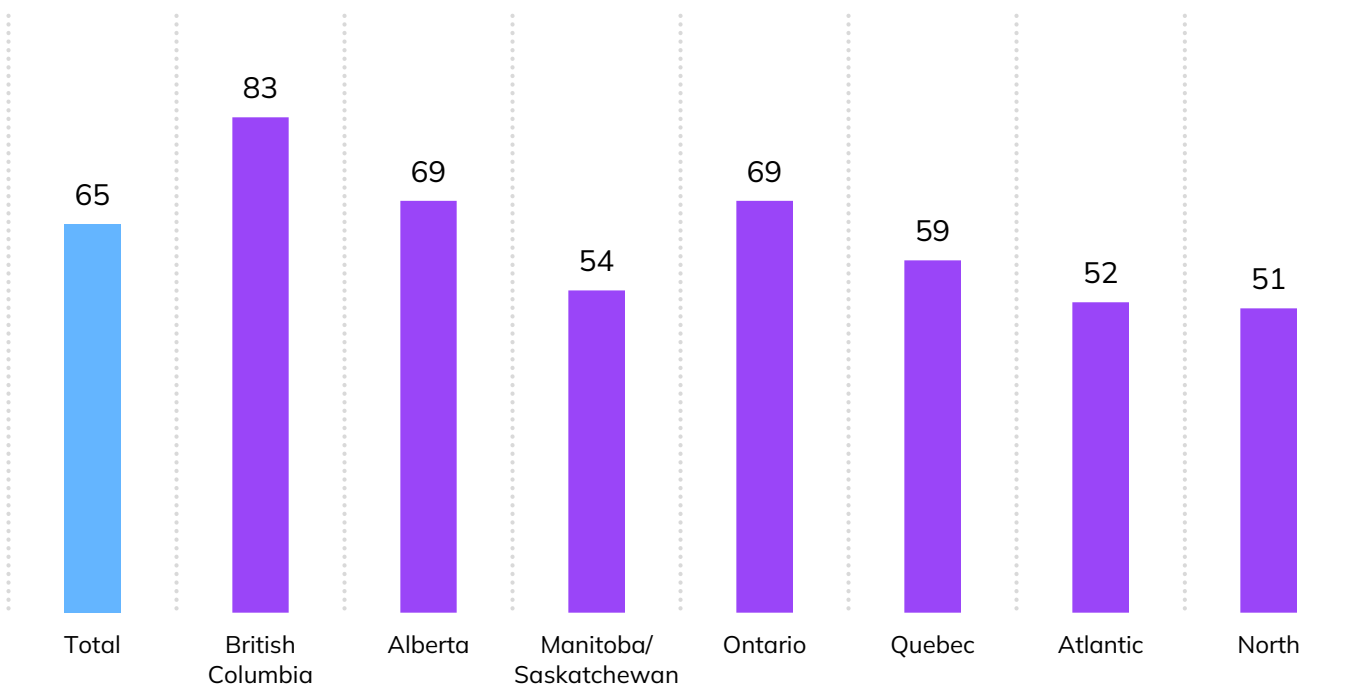


Indigenous Peoples living in BC are considerably more likely to be listening to streaming music services

YouTube is by far the most popular platform for streaming music, followed by Spotify.

Listen to a Streaming Music Service*

Indigenous Population 18+ | %



*Past month.

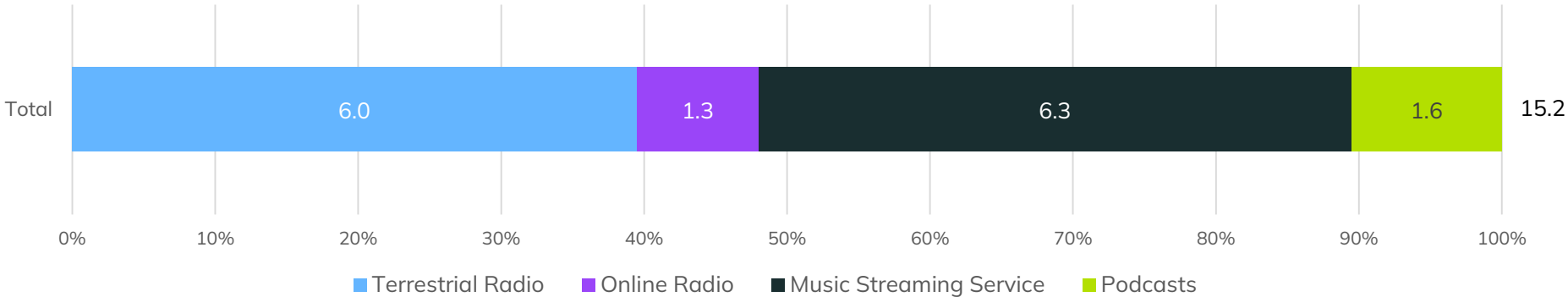


Approximately half of the time spent listening to audio comes from terrestrial and online AM/FM radio

Indigenous Peoples report listening to approximately 3 hours less of audio content each week compared to others living in Canada - 15.2 hrs/week versus 18.1 hrs/week respectively. Radio (terrestrial and online) makes up for the majority of this difference.

Self-Reported Hours of Audio Consumption*

Indigenous Population 18+ | Hours in a Typical Week



*Self-reported hours are not meant to be a replacement for Numeris data.



Social Media

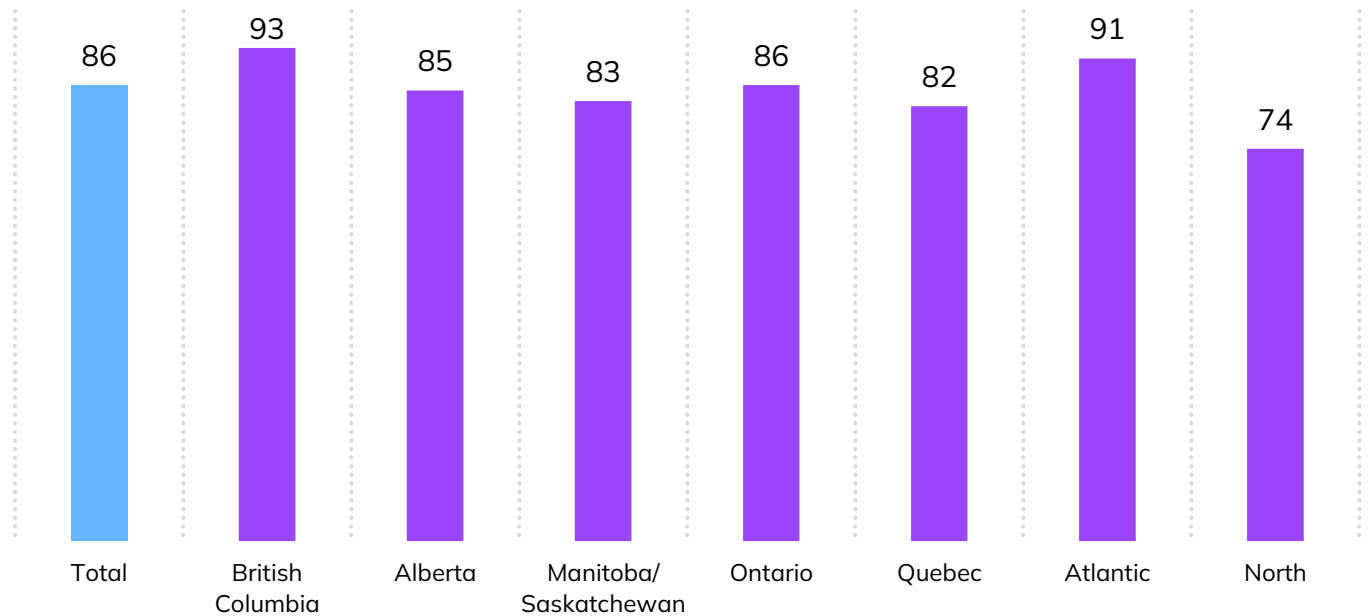


Indigenous Peoples across all regions of Canada actively engage with social media platforms

They are also more likely than others living in Canada to be social networking - 86% versus 75% respectively.

Use Social Media*

Indigenous Population 18+ | %



*Past month.

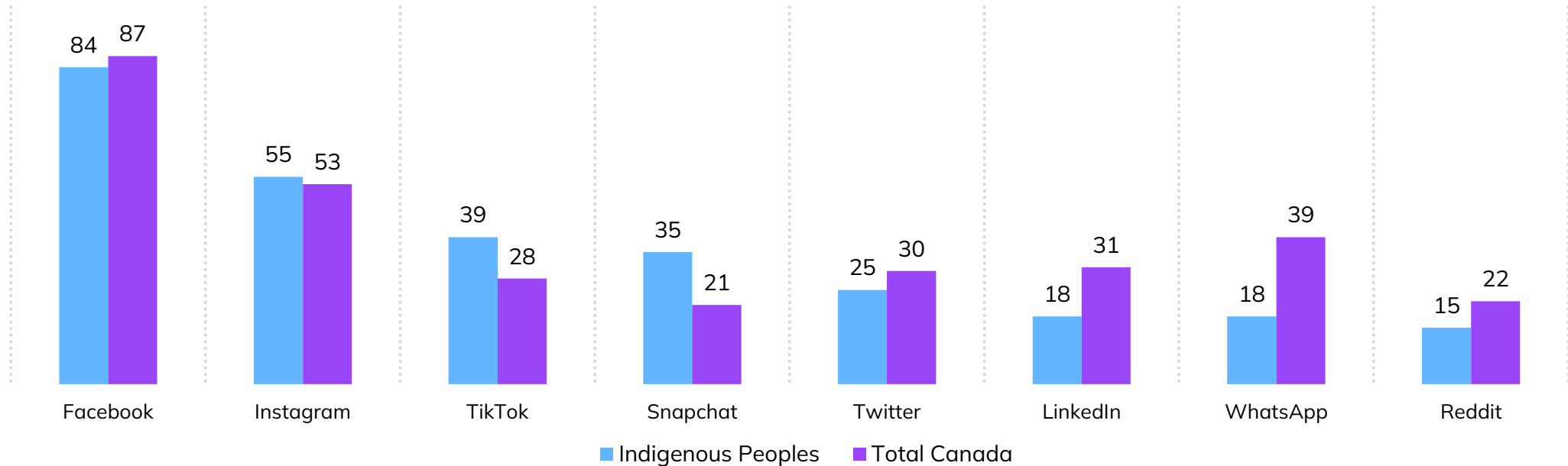


Facebook is the leading social media platform for all, but there are important variations with other platforms

TikTok and Snapchat are more popular among Indigenous Peoples while LinkedIn and WhatsApp are considerably less commonly used. This can have important implications for hiring, marketing and information sharing.

Social Media Platforms Used*

Social Media Users* 18+ | %



Indigenous Peoples report spending approximately 13 hours each week using social media platforms

Self-Reported Time Spent Using Social Media
Indigenous Social Networkers 18+ | Hours in a Typical Week





News

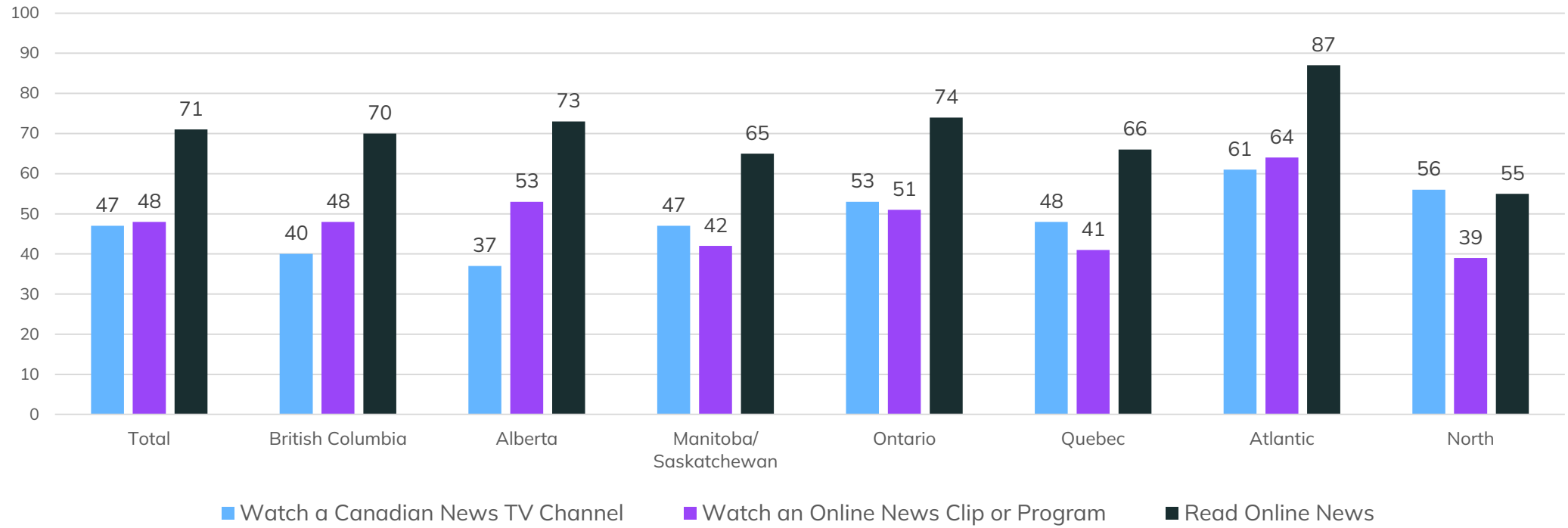


News consumption also varies from one region to another

Indigenous Peoples located in Atlantic Canada are some of the highest news users across the board, be it watching on TV, online or reading online. Indigenous Peoples in the North stand out due to greater use of Canadian TV news channels, but a lower incidence of watching news online.

Accessing News*

Indigenous Population 18+ | %



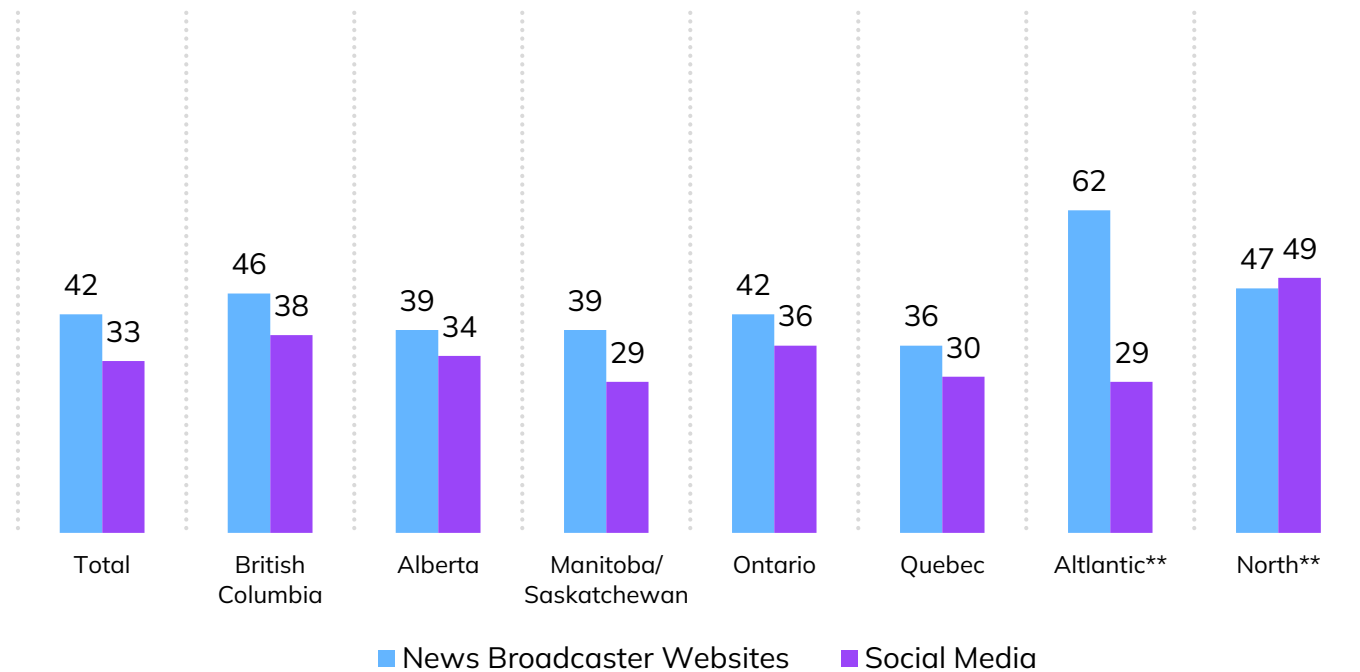


News broadcasters are more commonly used as a source for news content than social media for Indigenous Peoples

This is not the case in the North, however, where half of all Indigenous Peoples rely on social media as a news source - 48% more likely than the average Indigenous respondent (49% versus 33%).

Use of Online News by Source*

Indigenous Population 18+ | %



*Past month.
**Low sample size (N < 75).

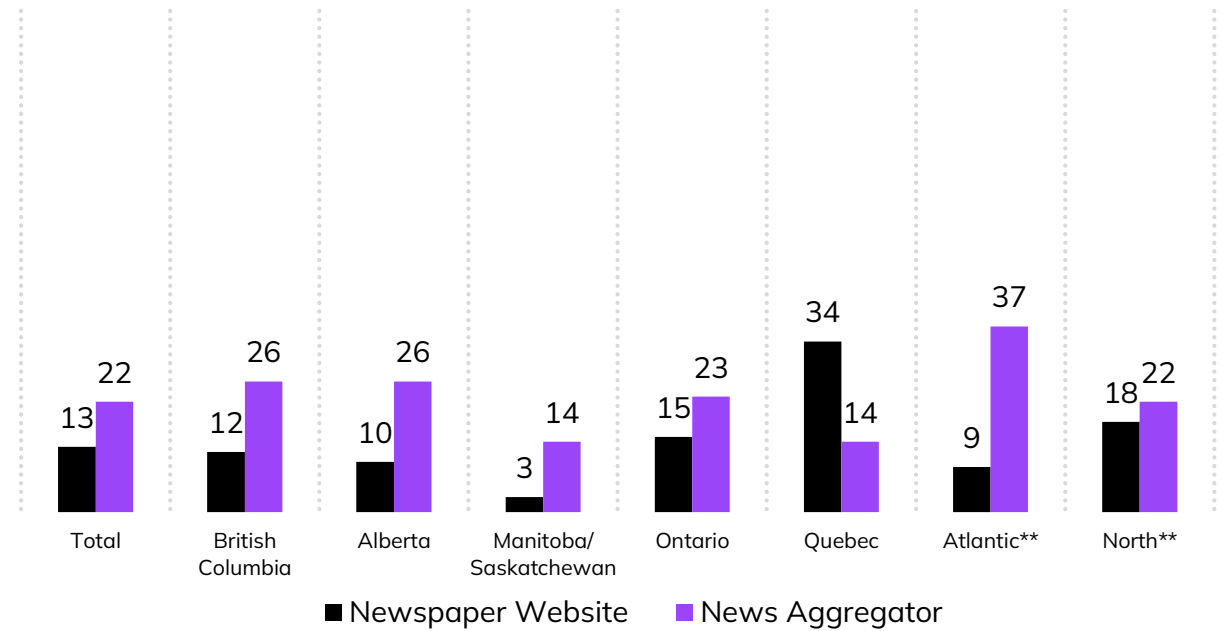


News aggregator sites like Google News or Apple News have a lead on newspapers in most regions

Indigenous Peoples in Quebec serve as the only exception here.

Use of Online News by Source*

Indigenous Population 18+ | %



*Past month.
** Low sample size (N < 75).



CBC

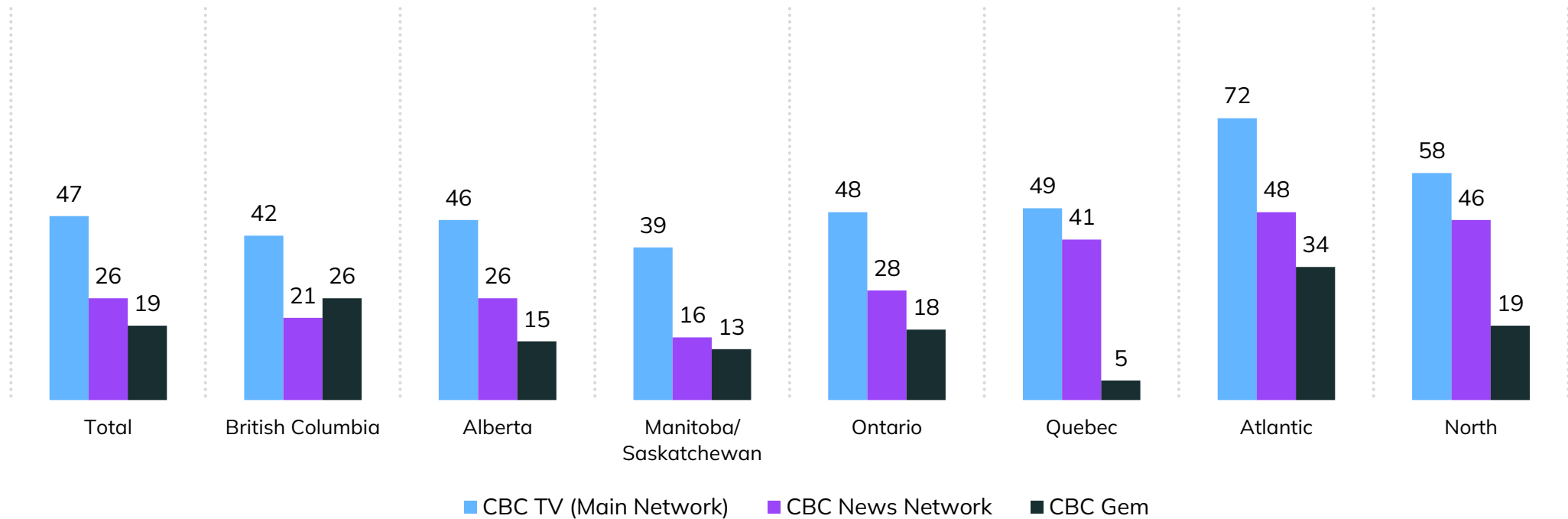


Indigenous Peoples in the Atlantic and the North are more likely to watch CBC TV and CBC News Network than those residing elsewhere...

Those residing in the Atlantic and British Columbia are the biggest users of CBC Gem.

Use of CBC TV/Streaming Video Services*

English-Speaking Indigenous Population 18+ | %



*Past month.

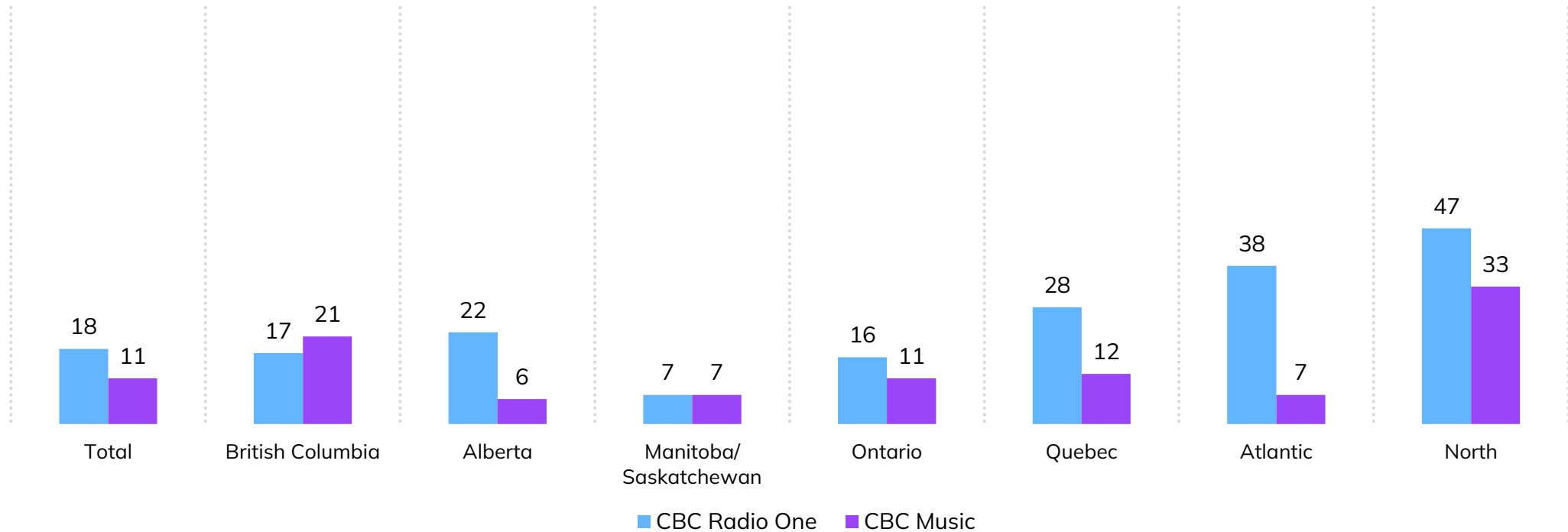


...And results are similar when it comes to listening to **CBC Radio One**

CBC Music is also popular in the North, with one third of Indigenous Peoples there tuning in. Indigenous Peoples in British Columbia are also big CBC Music fans, with 1 in 5 listening. This is the only region where CBC Music is more popular than CBC Radio One.

Use of CBC Radio Services*

English-Speaking Indigenous Population 18+ | %



*Past month.

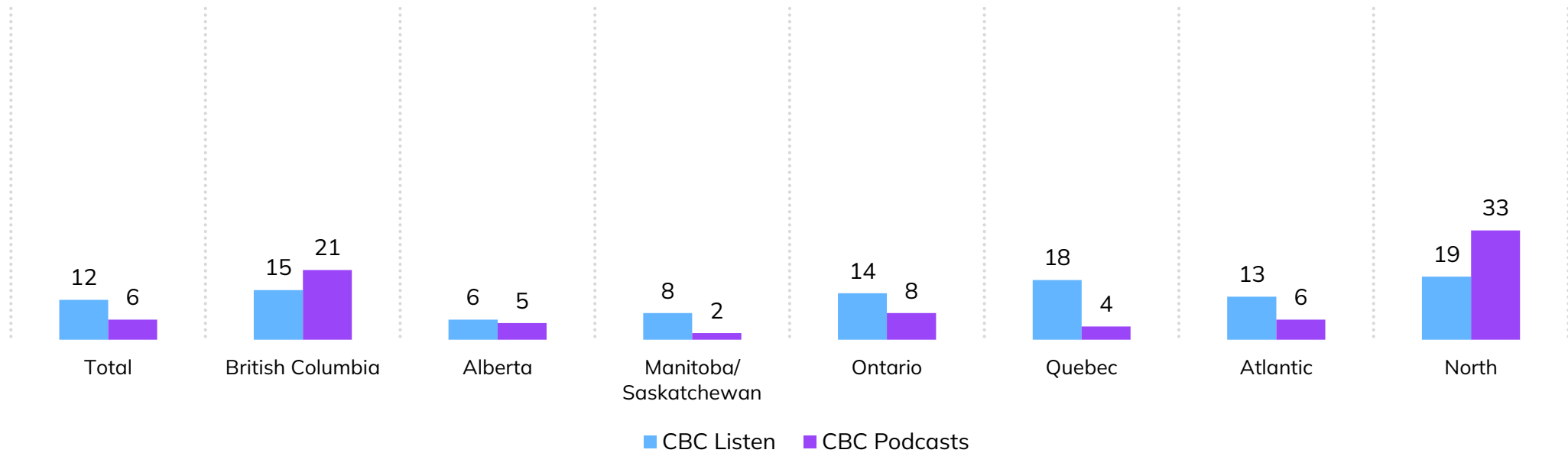


Indigenous Peoples in the North also lead in their usage of our online audio content

British Columbia residents are also among the biggest users. Quebec is also higher in terms of CBC Listen but not CBC Podcasts.

Use of CBC Online Audio Content*

English-Speaking Indigenous Population 18+ | %



*Past month.

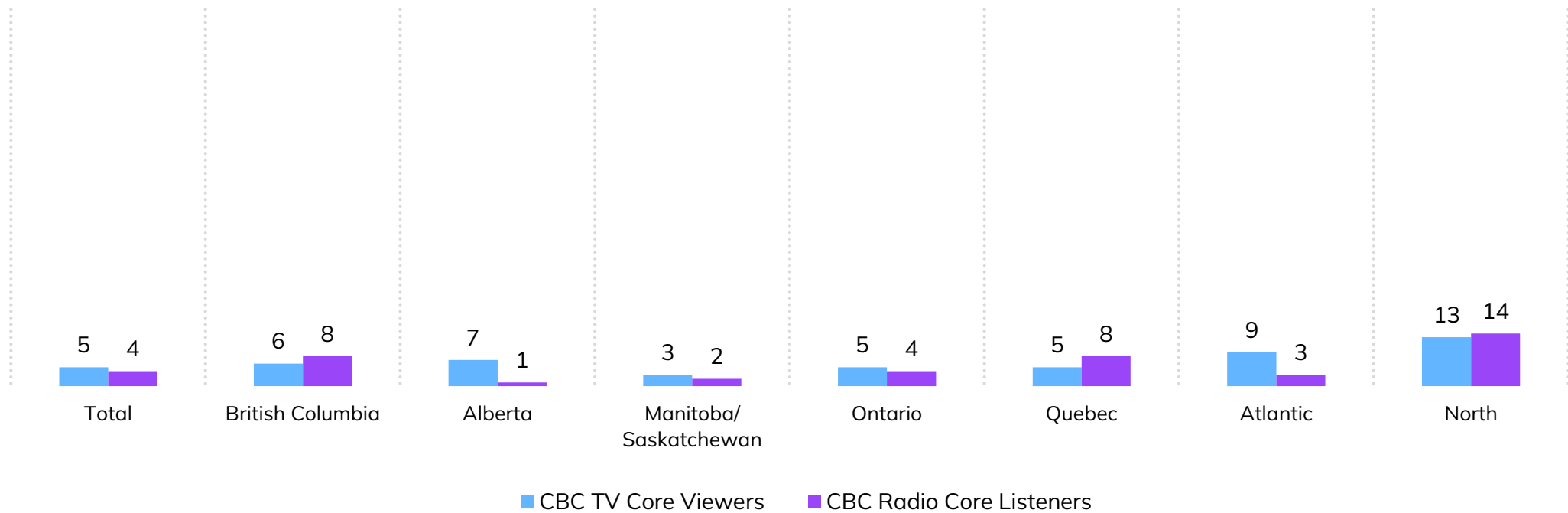


Among Indigenous Peoples, core CBC TV viewership is highest in the Atlantic, Alberta and the North

Core CBC Radio listenership is more than 3 times as common among Indigenous Peoples in the North and twice as high among those living in British Columbia or Quebec.

Core Users (7+Hours/Typical Week for a Given Platform)

English Speaking Indigenous Population 18+ | %



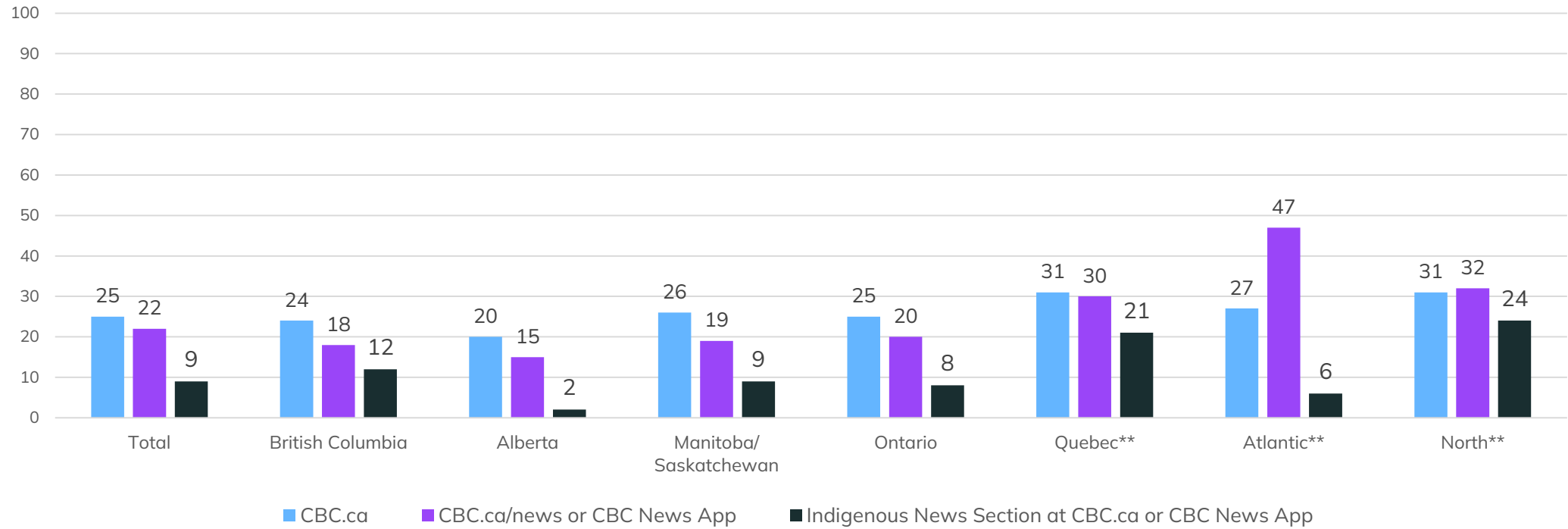


1 in 4 English-speaking Indigenous Peoples are accessing CBC.ca

Continuing trends observed with our other services, usage of CBC services, especially the Indigenous News Section of our website and app, is higher among those residing in the North.

Use of CBC Online Services*

English-Speaking Indigenous Population 18+ | %



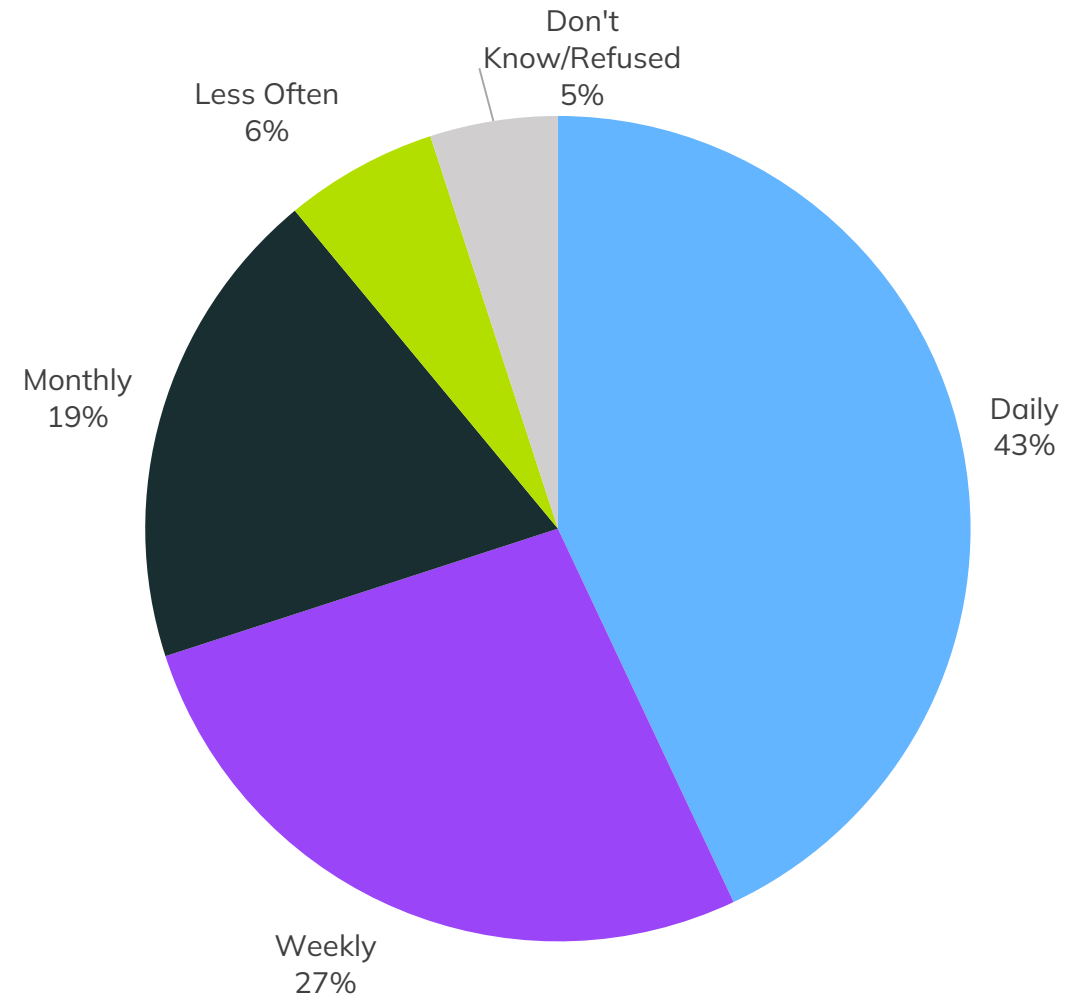
*Past month.
**Low sample size (N < 75).



Among English-speaking Indigenous Peoples who access CBC News online*, more than 2 in 5 do so daily

Frequency of Use – CBC.ca/news or the CBC News App

English-Speaking Indigenous Population Who Accesses CBC News Online* 18+ | %



*Via CBC.ca/news or the CBC News App, in the past month.



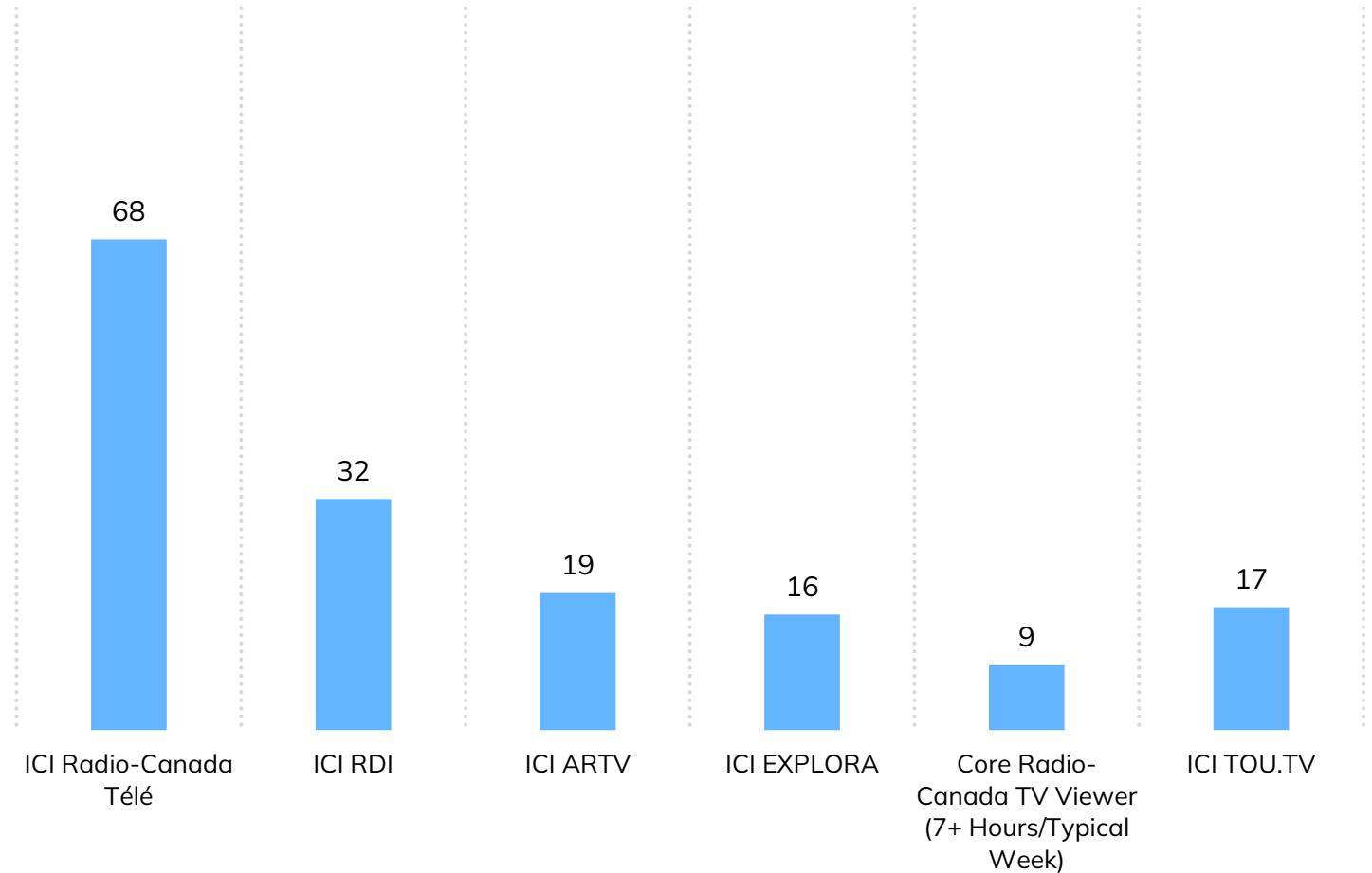
Radio-Canada



Almost 7 in 10 French-speaking Indigenous Peoples are tuning into ICI Radio-Canada Télé

Roughly 1 in 3 are RDI viewers, and 1 in 10 meet our criteria for core viewers.

Use of Radio-Canada TV/Streaming Video Services*
French-Speaking Indigenous Population 18+ | %



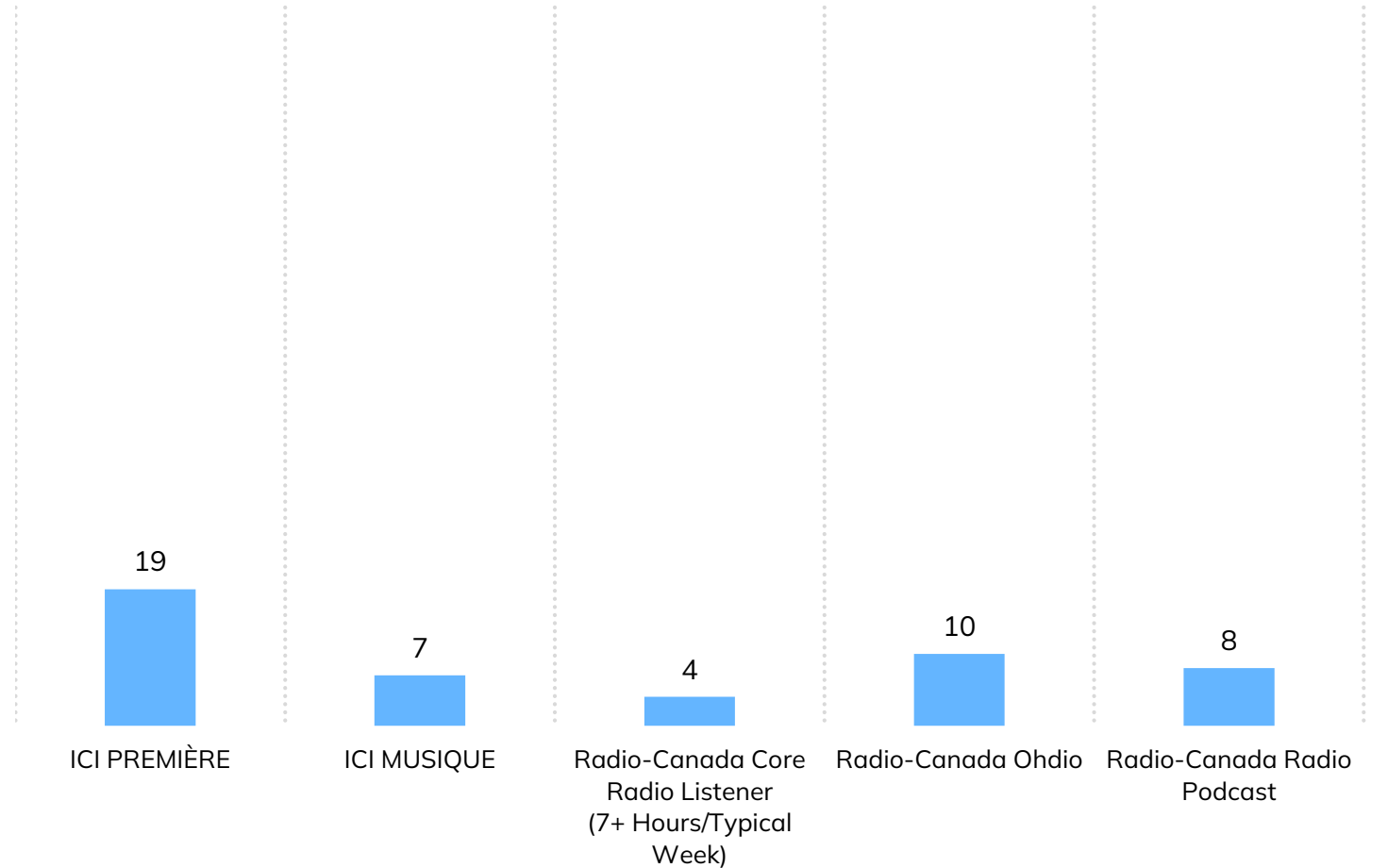
*Past month.



ICI Première reaches almost 1 in 5 members of the French-speaking Indigenous population

Other services, including Ohdio, are heard by roughly 1 in 10.

Use of Radio-Canada Radio Services*
French-Speaking Indigenous Population 18+ | %



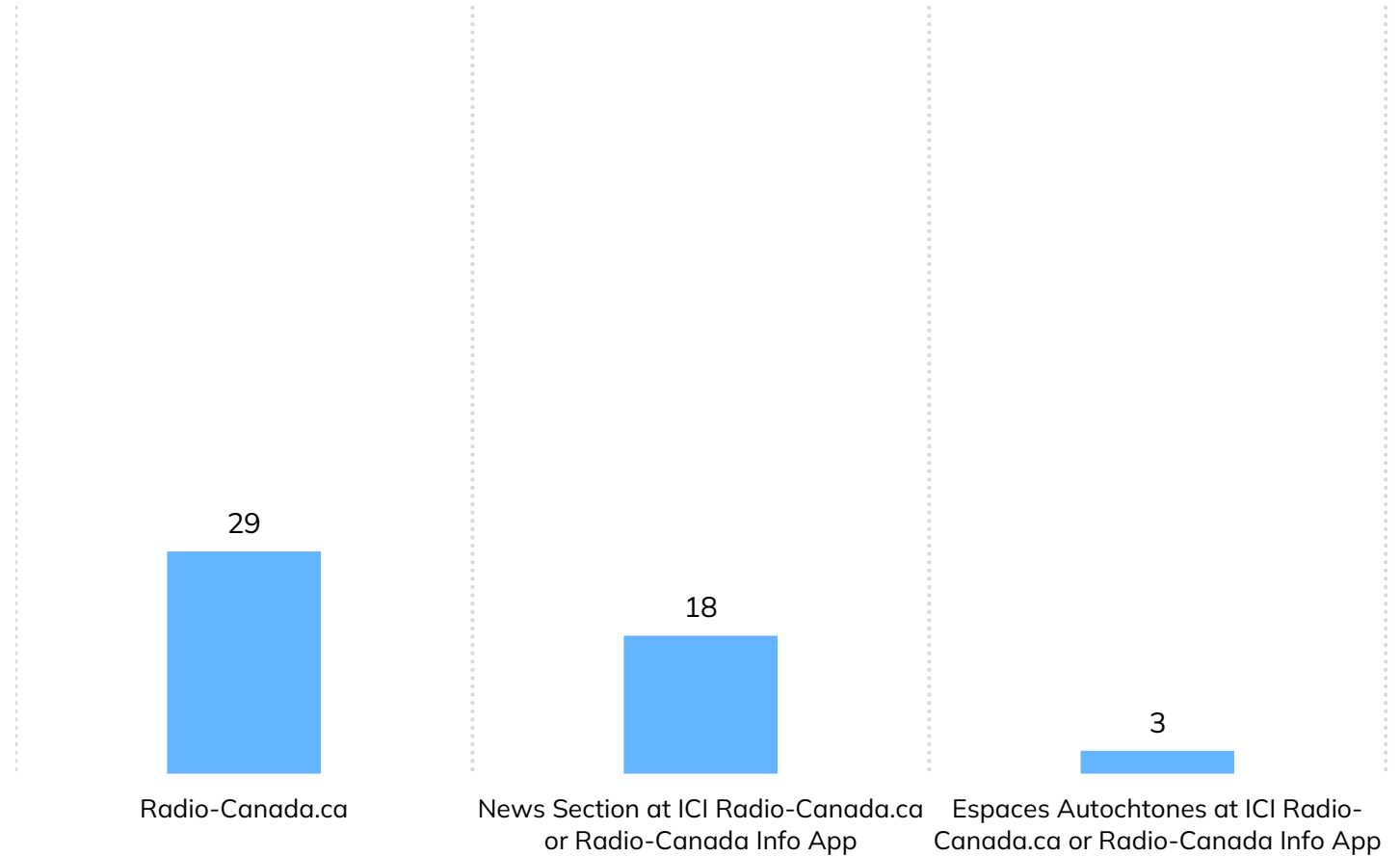
*Past month.



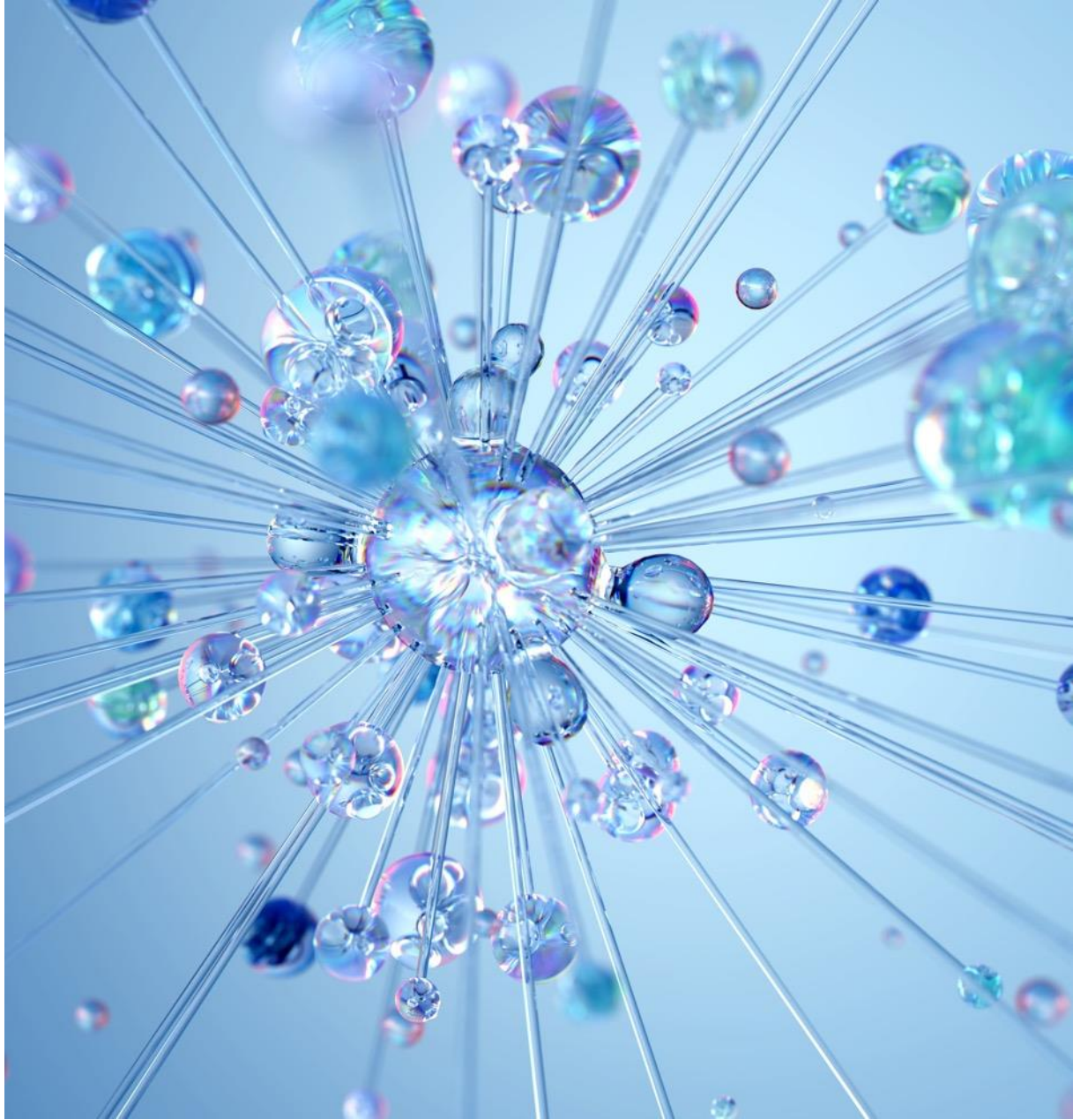
3 in 10 French-speaking Indigenous Peoples are radio-canada.ca users

Almost 1 in 5 cite ICI.Radio-Canada.ca as an online news source.

Use of Radio-Canada Online Services*
French-Speaking Indigenous Population 18+ | %



*Past month.



Appendix



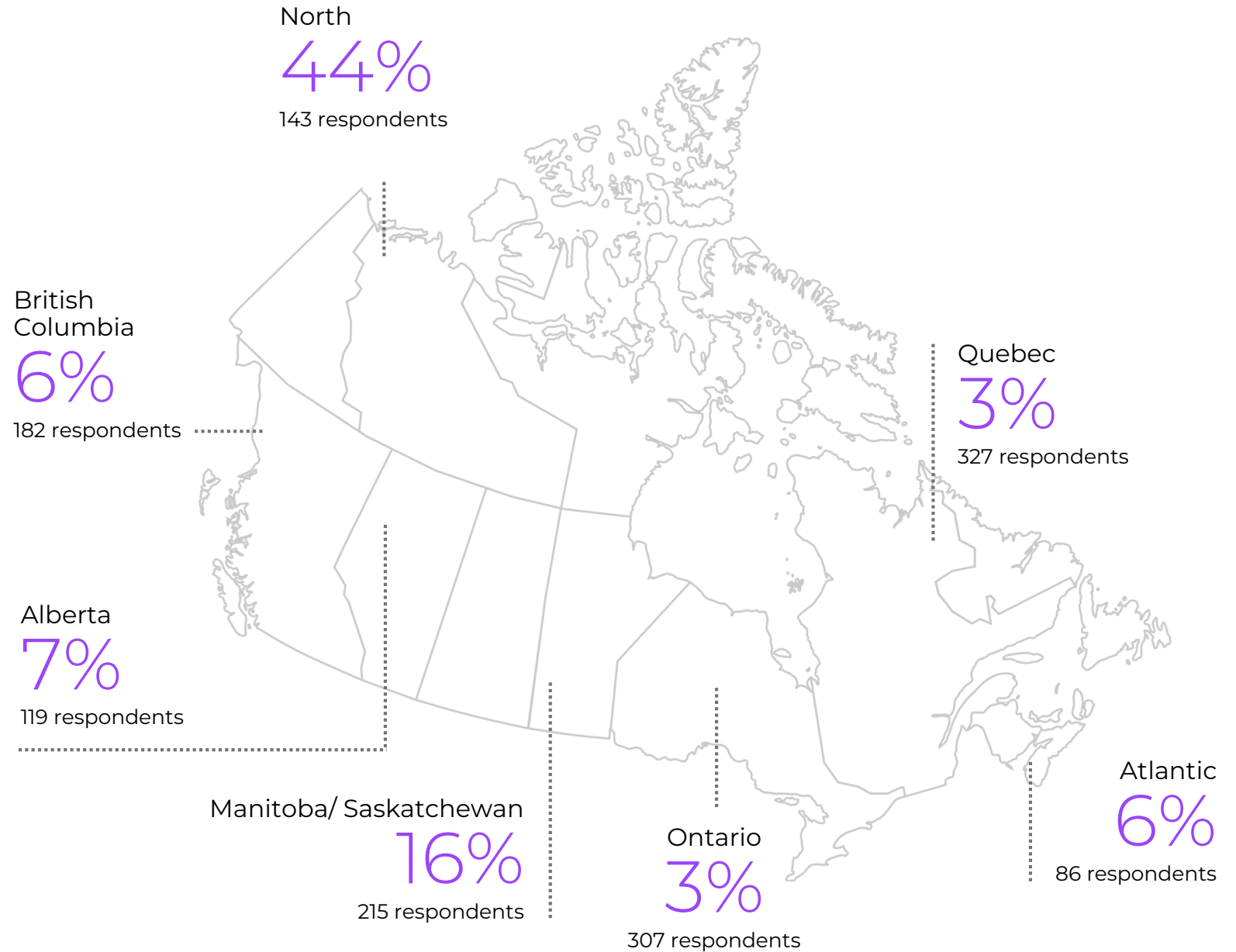
The MTM has reached a large enough sample of Indigenous respondents this year to perform analysis by region

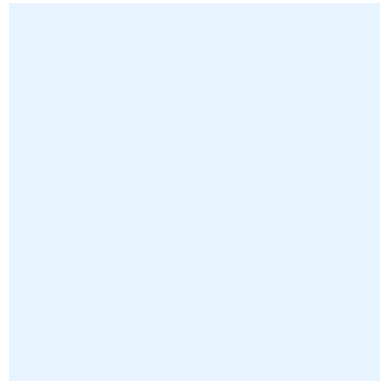
Proportion of Sample That Identifies as Indigenous

Total Population 18+ | % and N

Total Indigenous Respondents

1379





Methodology

The Media Technology Monitor (MTM) is the highest quality media survey in Canada. It employs large sample sizes and achieves response rates far exceeding industry standards. Moreover, it includes Canadians with landline telephone service and those who rely solely on a cell phone. This blended sampling approach can reach 99% of Canadians. The MTM is a product of CBC/Radio-Canada Research and Analysis.

The MTM measures Canadians' media technology adoption and use at two points in time. In the Fall, telephone interviews are conducted with 8,000 Canadians (4,000 Anglophones and 4,000 Francophones). To monitor changes in the media landscape over the year, a telephone survey with an independent sample of 4,000 Canadians (2,000 Anglophones and 2,000 Francophones) is conducted in the Spring.

The combined results reported here are based on the Fall 2022 and Spring 2023 survey of 1,379 Indigenous respondents across all regions of Canada. The response rate is approximately 21%. Of the telephone respondents, 1,036 completed a follow-up online questionnaire. The transition rate among online respondents from telephone to online is over 75%.

The fall interviews were conducted from September 20th to December 16th, 2022 and the spring interviews were conducted from March 14th to May 14th, 2023 by Ad hoc Recherche.

Results based on the total sample of 1,379 In are accurate within plus or minus 1.3% percentage points 19 times out of 20.

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